
 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
	Revision:	1.5
<small>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</small>	Effective Date	04/01/2008
	# Pages	50

GENERAL			
<b>Name</b>	ServiceCenter® 6.X Problem Management Training Manual		
<b>Description</b>	The Problem Management function of ServiceCenter® is accomplished through the use of "Problem Record". The solution is applicable to all existing users. Through automation, there will be overall process efficiency and quality improvements. The database will contain Incident and Service Request ticket data, Change Requests, Problem Records, details of each type of request, and user information.		
<b>Purpose</b>	The purpose of this training manual is to educate users on the ServiceCenter® v.6.1 functionality.		
<b>Document Owner</b>	Problem Management	<b>Owner Org</b>	CSL

VERSION HISTORY				
Version	Date	Author	Template	Change Summary
1.1	04/14/2007	Mahraun/Rowe		
1.2	08/11/2007	Freeman, Maggie		Modifications to match current state
1.4	02/06/2008	Maggie Freeman Calvin Clark		Modifications to match Test Procedures and functional Changes
1.5	04/01/2008	Maggie Freeman Calvin Clark		Modifications for clarity, added link to reports.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

# **Table of Contents**

**TABLE OF CONTENTS ..... 2**

**OVERVIEW ..... 3**

**LESSON 1: LOGGING IN TO SERVICECENTER® ..... 5**

**LESSON 2: OPENING A PROBLEM FROM AN INCIDENT ..... 8**

**LESSON 3: CREATING A STAND-ALONE PROBLEM..... 13**

**LESSON 4: SEARCHING/QUERYING A PROBLEM..... 19**

**LESSON 5: UPDATING A PROBLEM AND MOVE TO NEXT PHASE..... 24**


**LESSON 6: OPENING A KNOWN ERROR AND AN RFC..... 27**

**LESSON 7: TASKS..... 32**

**A. Assigning a Task,..... 32**

**B. Completing a Problem Task ..... 40**

**LESSON 8: CLOSING PROBLEM..... 47**

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<small>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</small>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50


## Overview

The ServiceCenter® Problem Management module implements IT Infrastructure Library (ITIL) best practices to find permanent solutions for recurring Incidents. Problem Management handles the complete lifecycle by integrating the Incident and Change Management processes to apply a complete and closed-loop approach.




Using Best Practice methods, ServiceCenter® is a comprehensive and fully integrated IT Service Management tool that enables NG to improve service levels, balance resources and control cost. ServiceCenter® with embedded ITIL-based best practices quickly deploys consistent, integrated work processes across every part of the organization.


## Purpose

The purpose of this training manual is to educate users on the ServiceCenter® v.6.X functionality. Through the information in this Training Manual, the user will review how to navigate and perform Problem Management tasks through the tool. The user will gain awareness of the features, functionality, and incorporated enhancements as they relate to ServiceCenter® v.6.X.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## Document Conventions

Document Conventions	<b>Bold</b>	Used for emphasis, commands, options, switches, and literal portions of syntax that must appear exactly as shown.
	<i>Italic</i>	Used for field names, file names, variables, and placeholders that represent the type of text required.
		Used for clarification and helpful hints.
		Used to alert the user of a potential problem or gives critical information.
		Used to designate the beginning of a set of step-by step instructions.
Sources of Help	<p>All questions, access requests, or problems associated with ServiceCenter should be directed to the Service Desk.</p> <p>Access to Production (<b>Live</b>) site:  <a href="https://sceast.it.northropgrumman.com/sc/index.do">https://sceast.it.northropgrumman.com/sc/index.do</a></p> <p>Use the link below to access the <b>Problem Management</b> report repository.  <a href="https://sharecenter.myngc.com/livelink/livelink.exe?func=ll&amp;objId=24878910&amp;objAction=browse&amp;sort=name&amp;viewType=1">https://sharecenter.myngc.com/livelink/livelink.exe?func=ll&amp;objId=24878910&amp;objAction=browse&amp;sort=name&amp;viewType=1</a></p>	

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

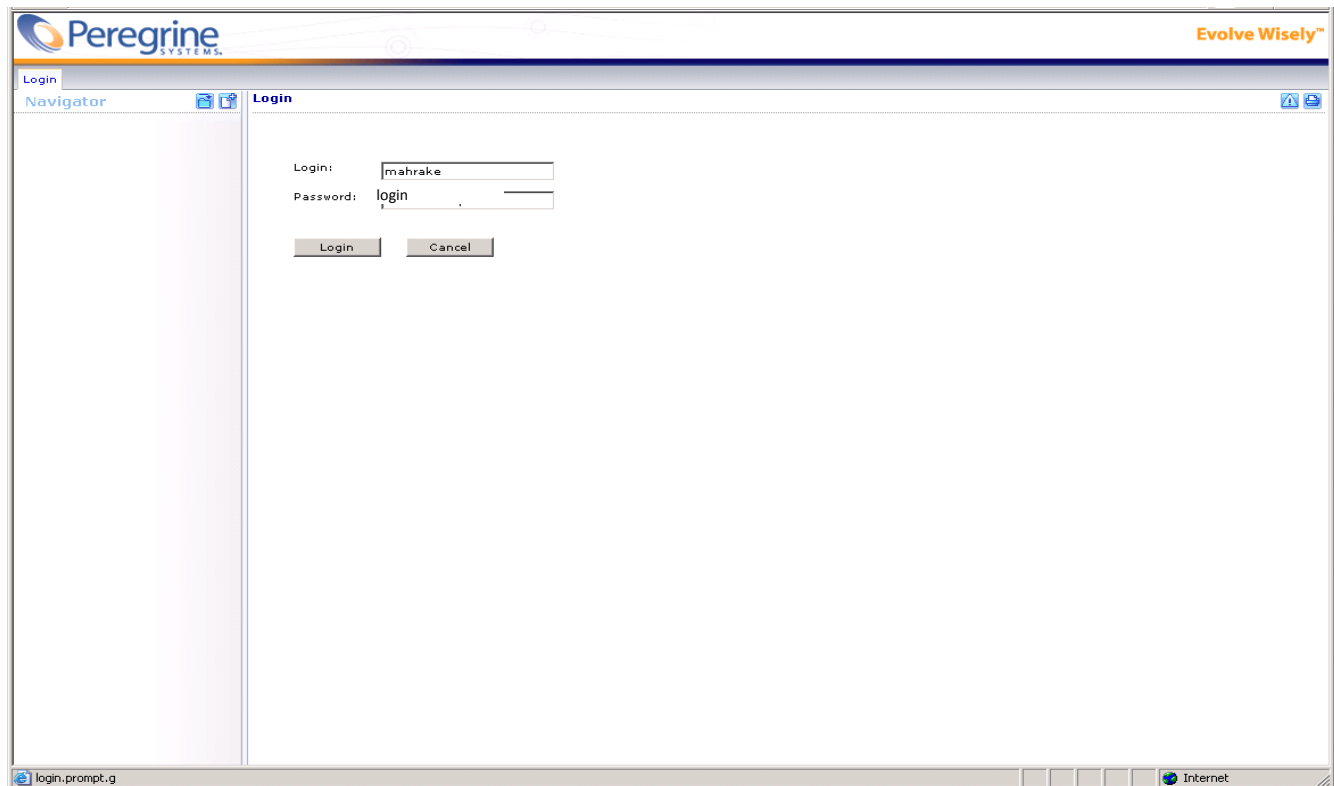
## Lesson 1: Logging in to ServiceCenter®

### Web Client

1. To launch the Web client the user will be given the URL for the production link prior to the Go Live date, the link below allows access to the development environment only.  
<https://sceast.it.northropgrumman.com/sc/index.do>

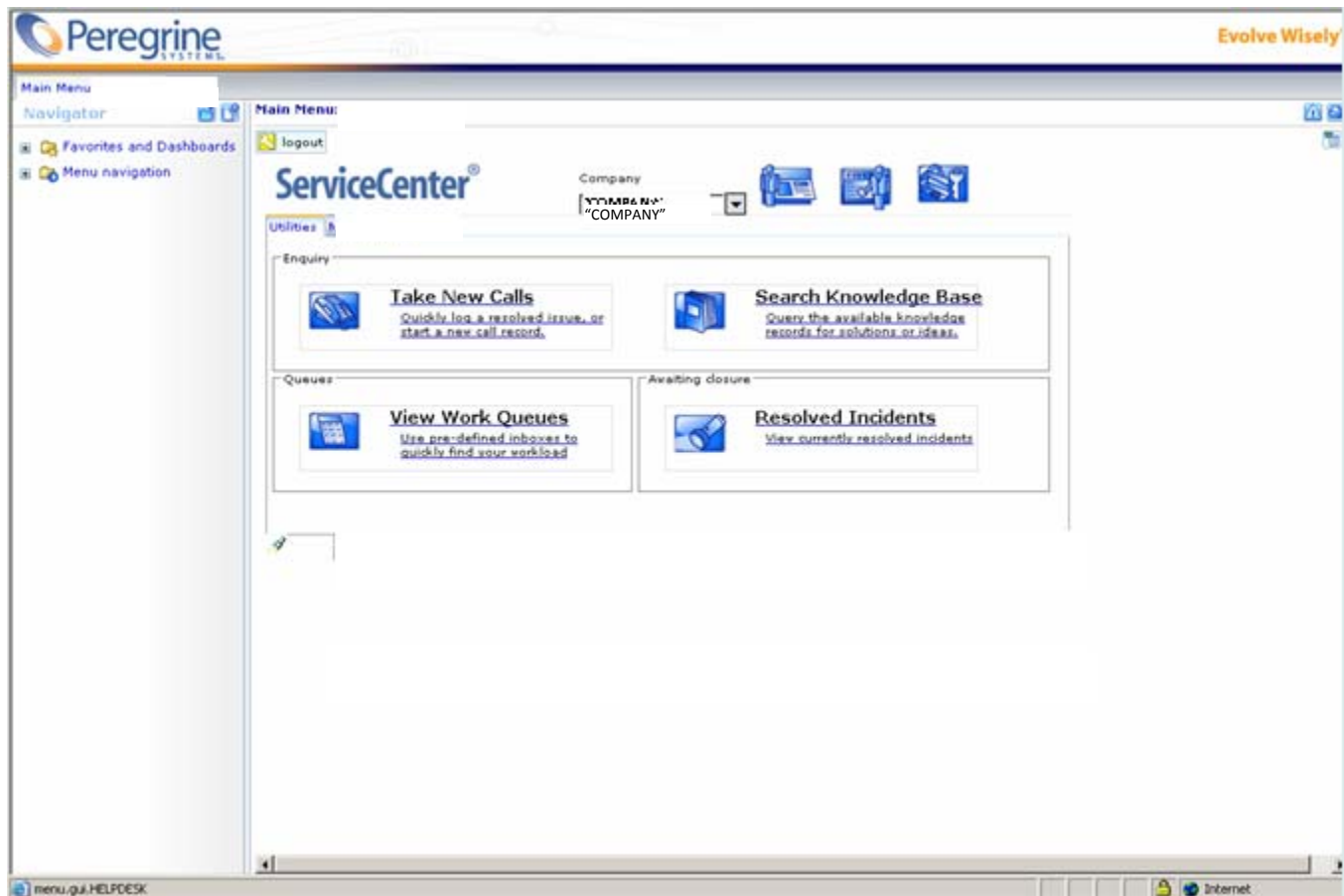
**NOTE:** Type **complete** user name, (**email account**) and secure password. (**john.doe@ngc.com**). The password length must be between 8-10 characters it allows, alpha, numeric, and special characters a minimum of one each. Service center keeps 13 passwords before allowing a repeat, each password must be reset every 90 days and there is no minimum reset requirement.

2. Type the assigned user name and secure password.
3. Click the **Login** button to authenticate.



<p><b><i>NORTHROP GRUMMAN</i></b></p> <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

4. After successful authentication, the following screen will appear:




Note: The screen also contains tools for system navigation located to the left of the logout button.

**System Navigator** - The System Navigator is a navigational structure that can be expanded and collapsed to view ServiceCenter® menus, tables, fields, forms, and other integral components.

**Editor** – The editor uses menus and tabs for navigation similar to previous versions of ServiceCenter®.


**Fast View** - Fast views are stored on the shortcut bar (the list of icons on the far left of the screen). When a fast view is created, the view minimizes to the shortcut bar where the user can access it when the shortcut bar icon is selected. Note: This is for the Windows client only.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

**Perspective** – Perspective is a new feature that allows an end-user to customize one or more views to provide all of the data and tools needed to complete a ServiceCenter® task. ServiceCenter® has a default perspective that is standard for accessing ServiceCenter® forms and data. Note: This is for the Windows client only.

There are eight major activities surrounding a Problem. Those activities are:

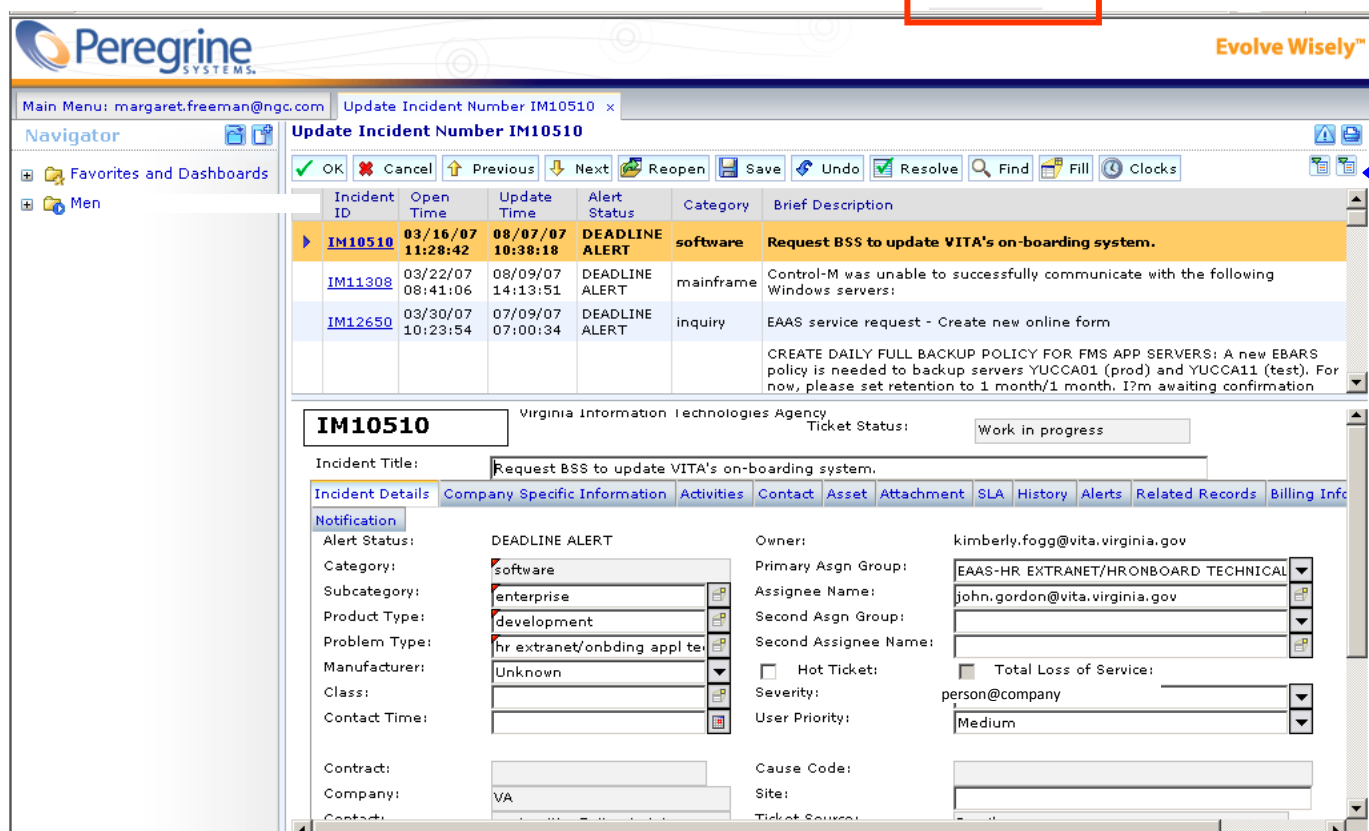
- Opening a Problem from an Incident
- Opening a Stand-alone Problem
- Searching / Querying Problems
- Updating Problems
- Opening a Known Error
- Opening a Request for Change (RFC) from an Error Record
- Assigning a Task
- Closing a Task

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #: 	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## Lesson 2: Opening a Problem from an Incident

NOTE: To relate a Problem to an existing Incident, the Problem must be created **before** the Incident is closed.

1. From the Incident Record, navigate to the **Related Records** tab, (detail) icon.
2. There are two menu icons at the top right of the screen. The icon on the left is the **list** icon; the icon to the right is the **detail** icon. Click the **detail** icon.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: margaret.freeman@ngc.com Update Incident Number IM10510 x

**Update Incident Number IM10510**

OK Cancel Previous Next Reopen Save Undo Resolve Find Fill Clocks

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
<b>IM10510</b>	03/16/07 11:28:42	08/07/07 10:38:18	DEADLINE ALERT	software	Request BSS to update VITA's on-boarding system.
IM11308	03/22/07 08:41:06	08/09/07 14:13:51	DEADLINE ALERT	mainframe	Control-M was unable to successfully communicate with the following Windows servers:
IM12650	03/30/07 10:23:54	07/09/07 07:00:34	DEADLINE ALERT	inquiry	EAAS service request - Create new online form

**IM10510** Virginia Information Technologies Agency Ticket Status: Work in progress

Incident Title: Request BSS to update VITA's on-boarding system.

**Incident Details** Company Specific Information Activities Contact Asset Attachment SLA History Alerts Related Records Billing Info

**Notification**

Alert Status: DEADLINE ALERT Owner: kimberly.fogg@vita.virginia.gov

Category: software Primary Asgn Group: EAAS-HR. EXTRANET/HRONBOARD TECHNICAL

Subcategory: enterprise Assignee Name: john.gordon@vita.virginia.gov

Product Type: development Second Asgn Group:

Problem Type: hr extranet/onbding appl te Second Assignee Name:

Manufacturer: Unknown ☐ Hot Ticket: ☐ Total Loss of Service:

Class: Severity: person@company

Contact Time: User Priority: Medium

Contract: Cause Code:

Company: VA Site:

Contact: Ticket Source:




3. Expand the menu to **Related – Problems – Open**.

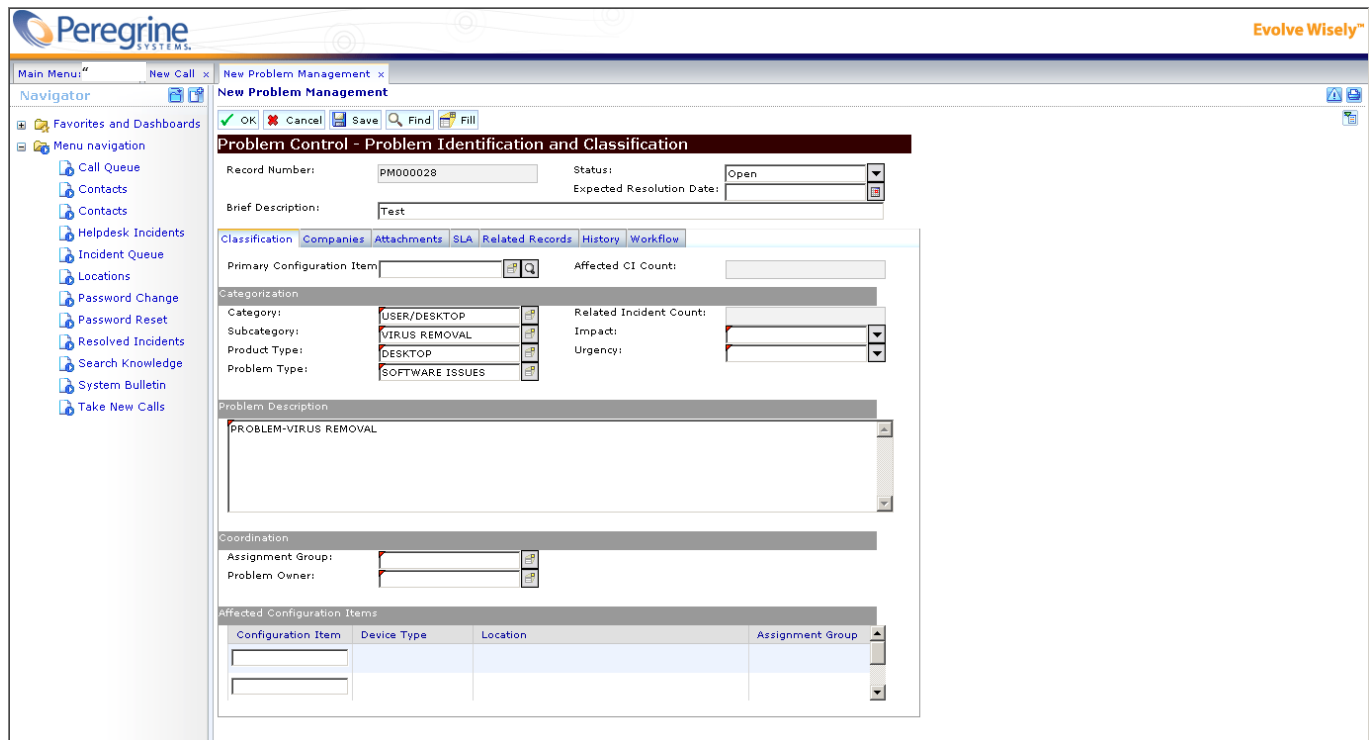
The screenshot displays the Peregrine Systems ServiceCenter 6.X Problem Management interface. The top navigation bar includes the Peregrine logo and the text "Evolve Wisely". The main menu on the left lists various options such as "Call Queue", "Contacts", "Helpdesk Incidents", "Incident Queue", "Locations", "Password Change", "Password Reset", "Resolved Incidents", "Search Knowledge", "System Bulletin", and "Take New Calls". The main content area shows a list of incidents with columns for Incident ID, Open Time, Update Time, Alert Status, Category, and Brief Description. Incident IM13715 is highlighted. Below the incident list, the "Incident Details" tab is active, showing the incident title "Test for Problem" and the ticket status "Open". The "Related" menu is expanded, showing "Problems" and "Open".

Incident ID	Open Time	Update Time	Alert Status	Category	Brief Description
IM13711	04/08/07 23:01:29	04/08/07 23:01:29	open	TELECOM	TEST IM
IM13707	04/06/07 20:32:10	04/09/07 17:18:13	updated	NETWORK_NGC	Problem test
IM13631	04/02/07 17:25:26	04/08/07 23:08:17	updated	USER/DESKTOP	PROBLEM-SO
IM13660	04/03/07 11:28:15	04/03/07 11:28:15	open	ACCESS SECURITY/MODIFICATIONS	
IM13715	04/08/07 23:38:26	04/08/07 23:38:26	open	USER/DESKTOP	Test
IM13699	04/06/07 09:23:24	04/08/07 22:56:31	updated	ACCESS SECURITY/MODIFICATIONS	testing probl

Call ID	Open Time	Owner	Status
CALL13222	04/08/07 23:36:24	"	Open - Linked

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

Note: The following screen shown below will appear:




The screenshot displays the 'New Problem Management' interface in the Peregrine Systems application. The main window is titled 'Problem Control - Problem Identification and Classification'. It contains several sections for data entry:

- Record Information:** Record Number (PM000028), Status (Open), Expected Resolution Date.
- Description:** Brief Description (Test).
- Classification:** Primary Configuration Item, Affected CI Count, Category (USER/DESKTOP), Subcategory (VIRUS REMOVAL), Product Type (DESKTOP), Problem Type (SOFTWARE ISSUES), Related Incident Count, Impact, Urgency.
- Problem Description:** A text area containing 'PROBLEM-VIRUS REMOVAL'.
- Coordination:** Assignment Group, Problem Owner.
- Affected Configuration Items:** A table with columns for Configuration Item, Device Type, Location, and Assignment Group.

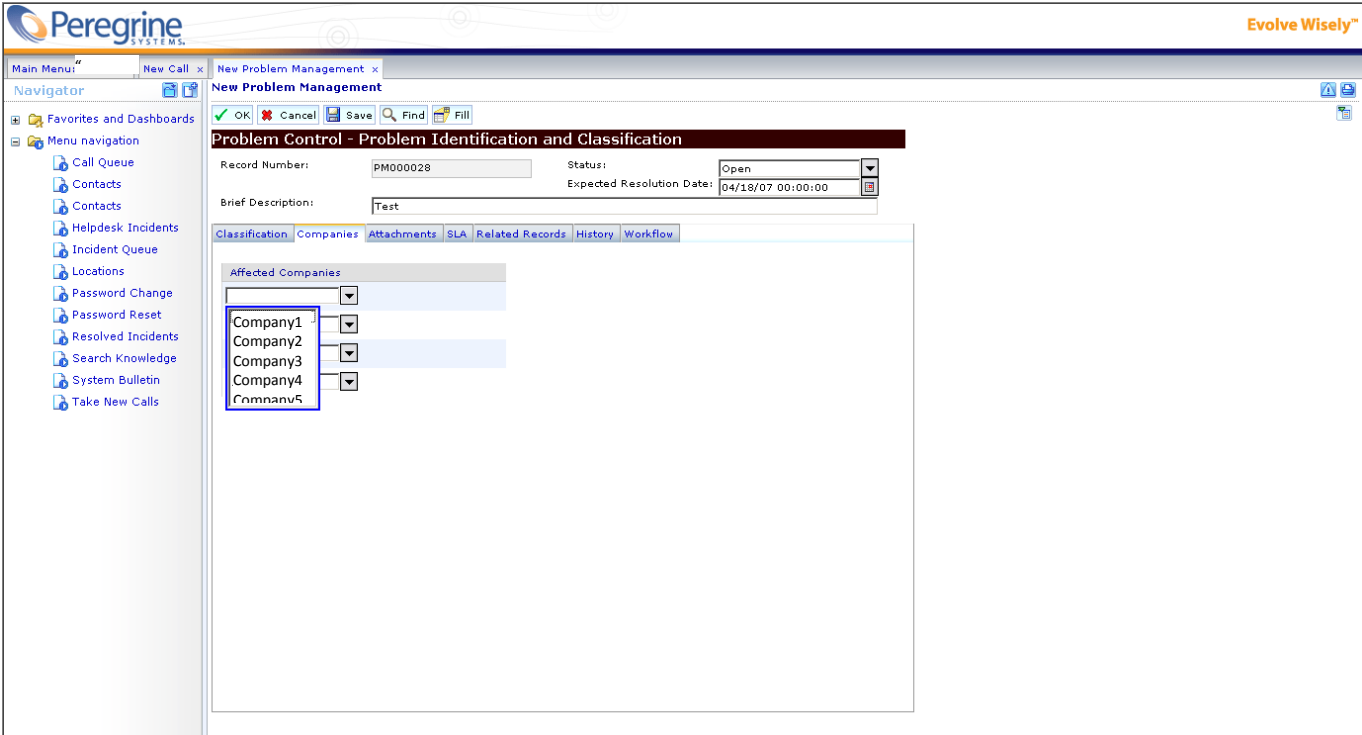
Note: Some information from the Incident will automatically carry over into the new Problem.

- Verify the accuracy of the information brought over into the Problem. Correct any information that needs to be changed.
- Update the ticket with any additional information that is known about the Problem in the Problem Description area.
- Complete the rest of the required fields: **Impact, Urgency, Assignment Group** (must be in CAPS) and **Problem Owner** (**Note:** If Configuration Item information is known, input the data)


Note: The Incident Resolver and Problem Assignment Group will not always be the same group.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

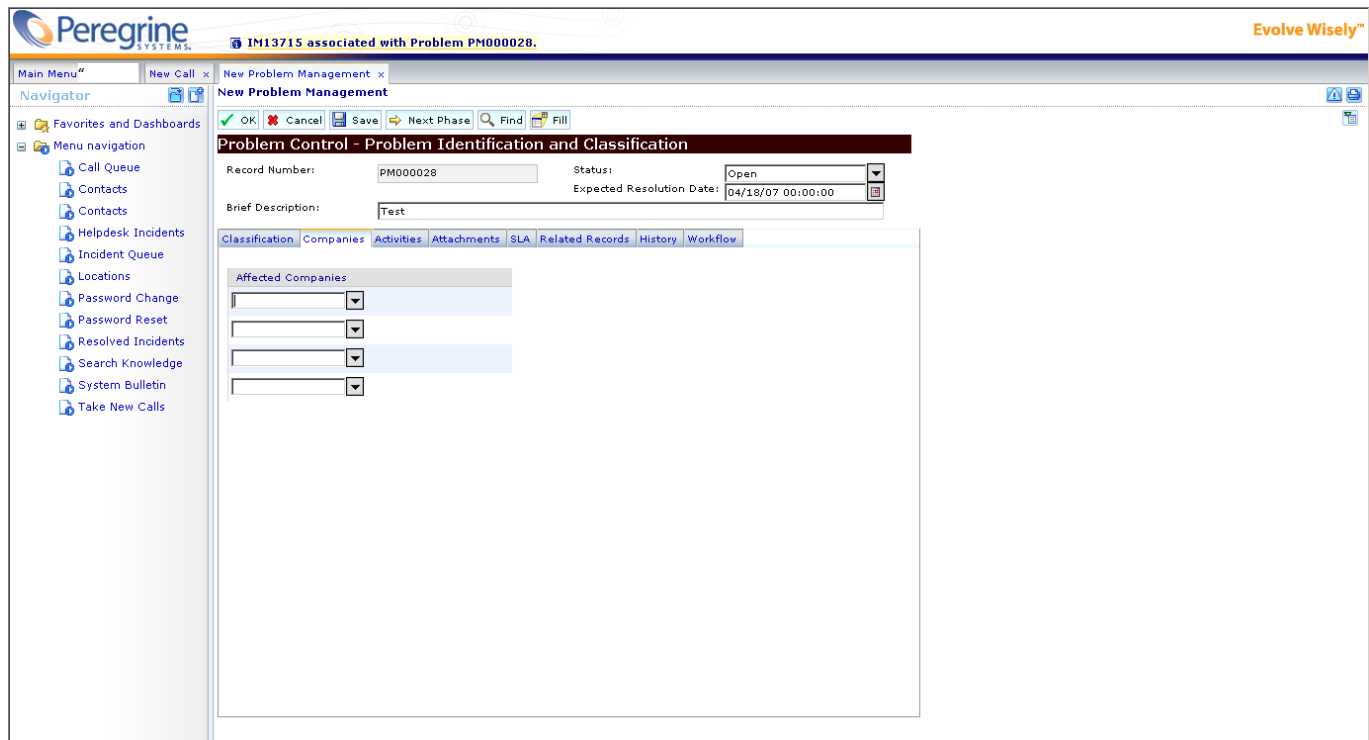
- On the **Companies** tab, select any impacted 'companies' in this environment.



The screenshot shows the Peregrine Systems web interface. The main window is titled 'Problem Control - Problem Identification and Classification'. It contains a 'Record Number' field with the value 'PM000028', a 'Status' dropdown set to 'Open', and an 'Expected Resolution Date' of '04/19/07 00:00:00'. Below these fields is a 'Brief Description' field with the text 'Test'. The 'Classification' section has tabs for 'Classification', 'Companies', 'Attachments', 'SLA', 'Related Records', 'History', and 'Workflow'. The 'Companies' tab is active, showing a list of 'Affected Companies'. The list includes 'Company1', 'Company2', 'Company3', 'Company4', and 'Company5'. 'Company1' is highlighted with a blue box.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

5. Click **Save** button at the top of the Screen.
6. The Problem will now indicate that it is associated with the Incident.



Peregrine SYSTEMS. IM13715 associated with Problem PM000028. Evolve Wisely™

Main Menu New Call x New Problem Management x

Navigator Favorites and Dashboards Menu navigation

- Call Queue
- Contacts
- Contacts
- Helpdesk Incidents
- Incident Queue
- Locations
- Password Change
- Password Reset
- Resolved Incidents
- Search Knowledge
- System Bulletin
- Take New Calls

Problem Control - Problem Identification and Classification

Record Number: PM000028 Status: Open


Expected Resolution Date: 04/18/07 00:00:00

Brief Description: Test

Classification Companies Activities Attachments SLA Related Records History Workflow

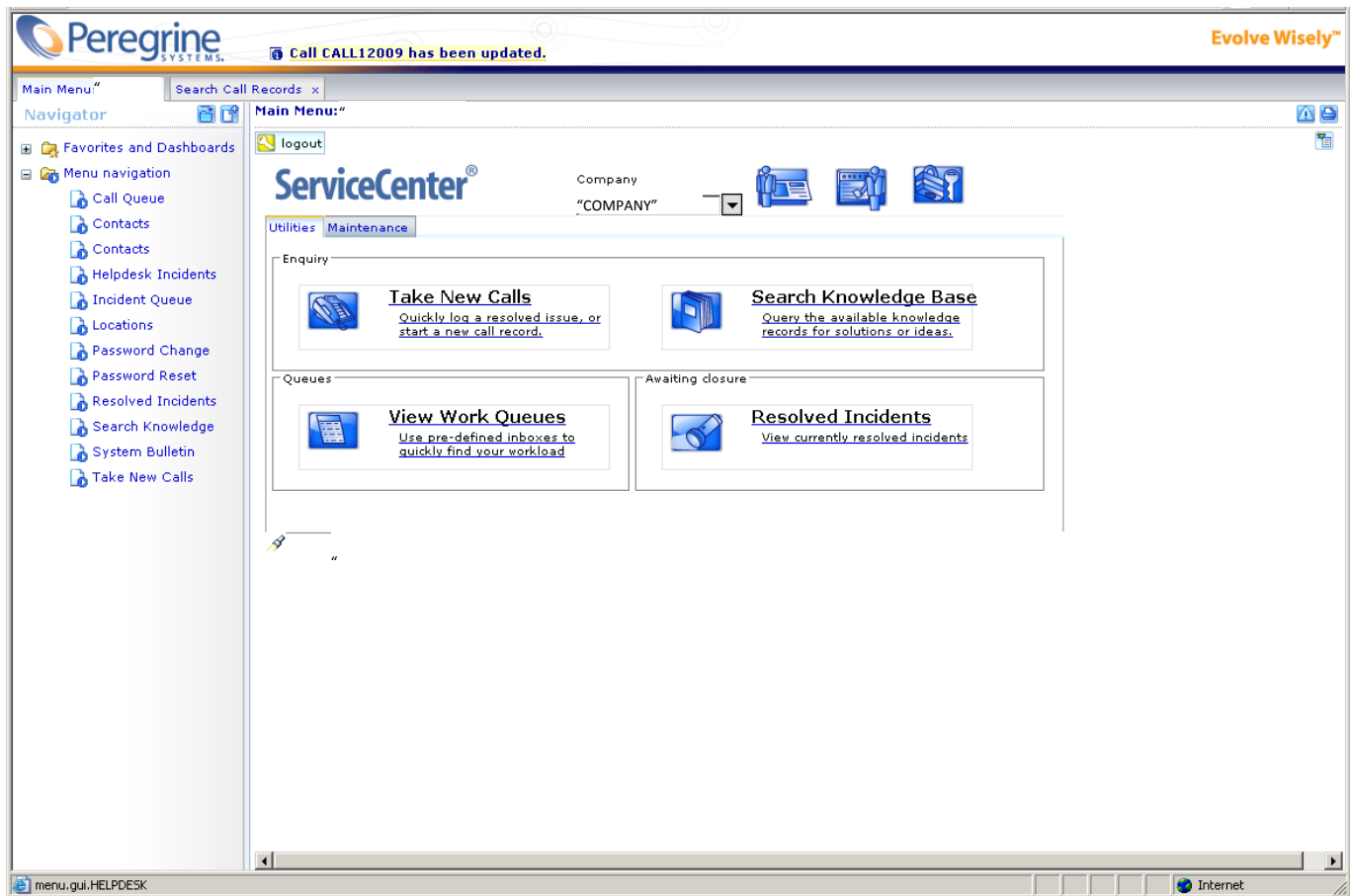
Affected Companies


- 
- 
- 
-

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

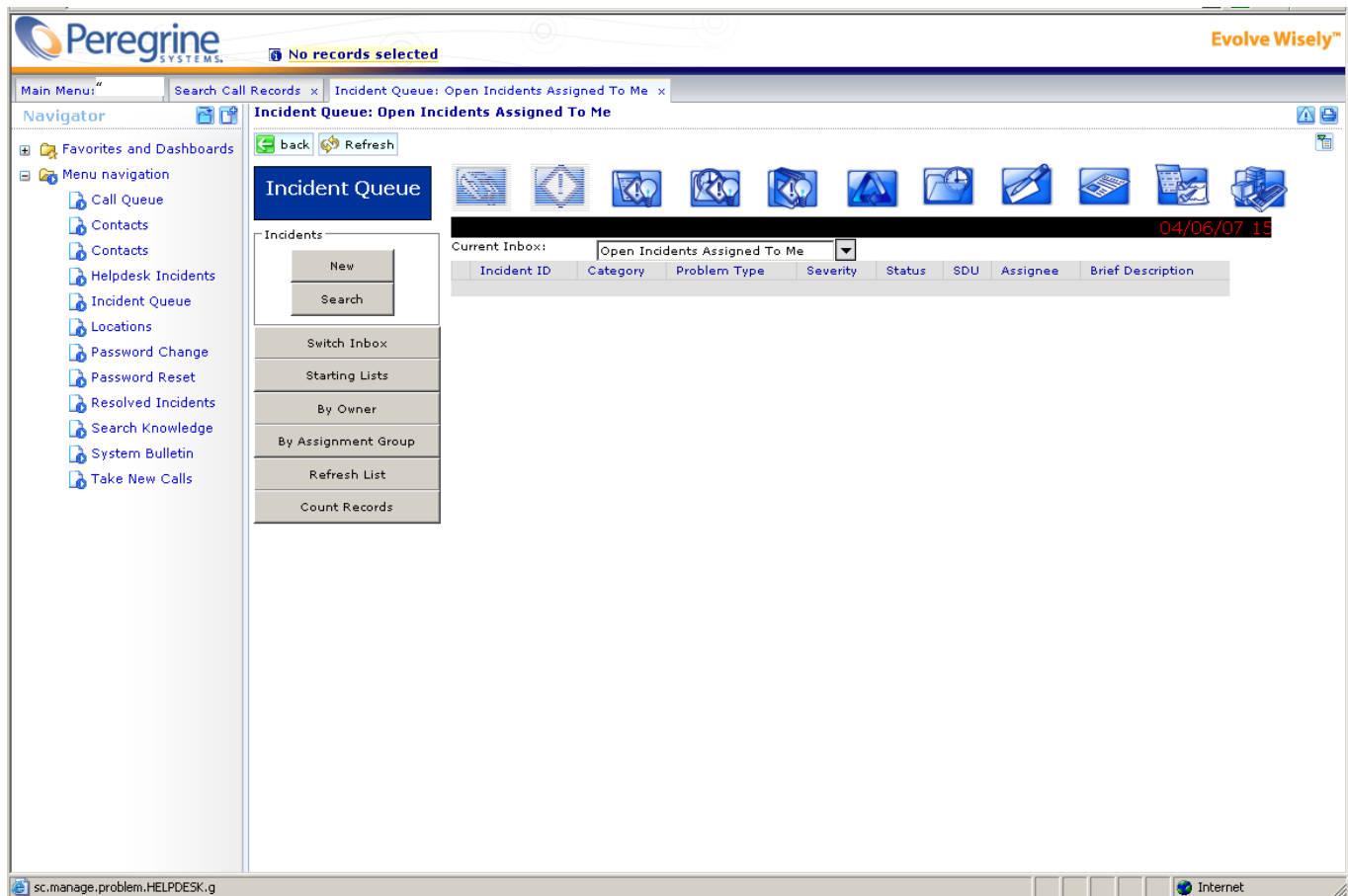
## Lesson 3: Creating a Stand-Alone Problem


1. Begin at the main menu and select **View Work Queues**.



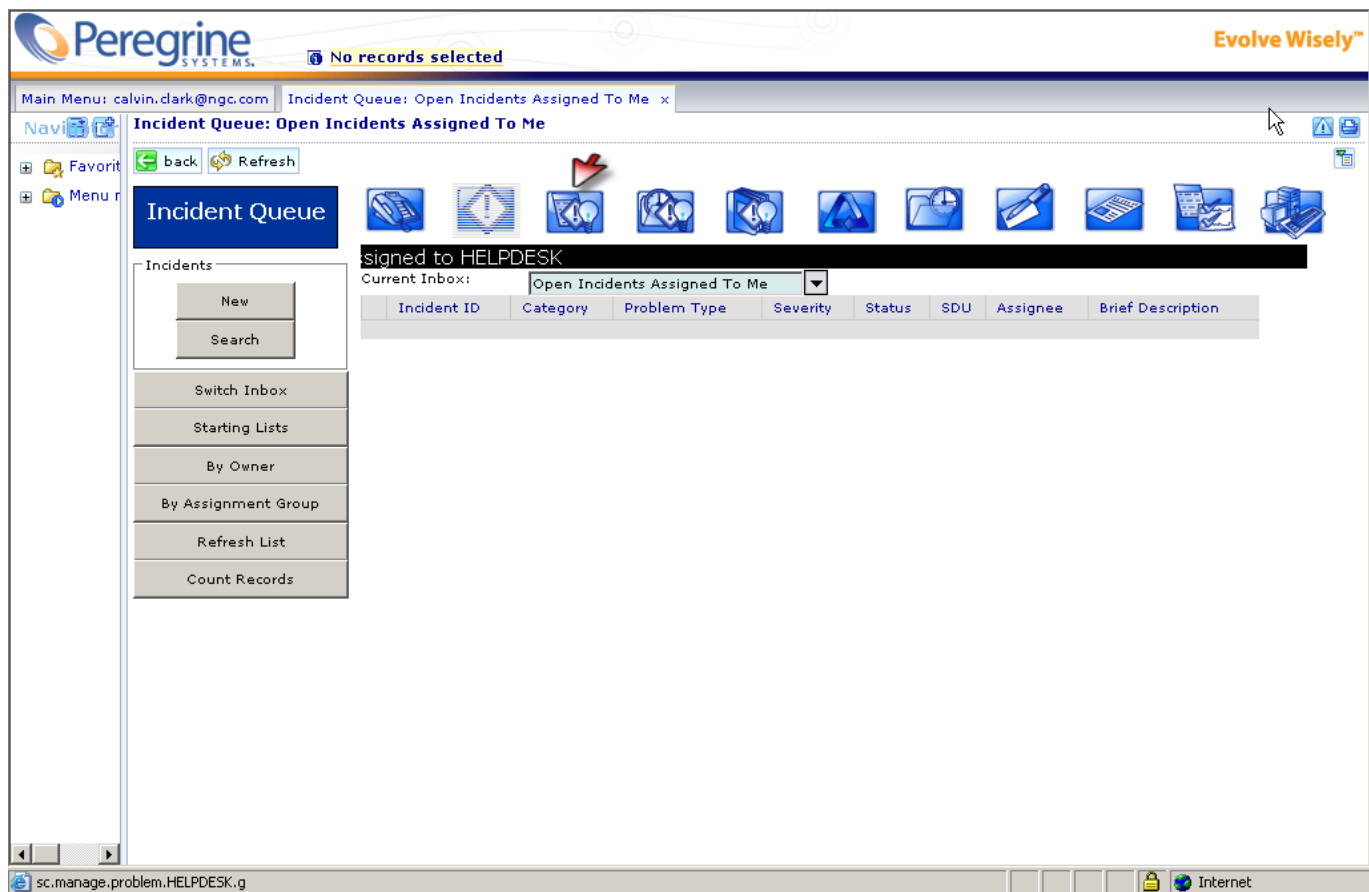
 <p>Commercial, State and Local (CSL) group <b>PROCEDURE</b></p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50


Note: The following search screen will appear; the default screen is the **Incident Queue**.



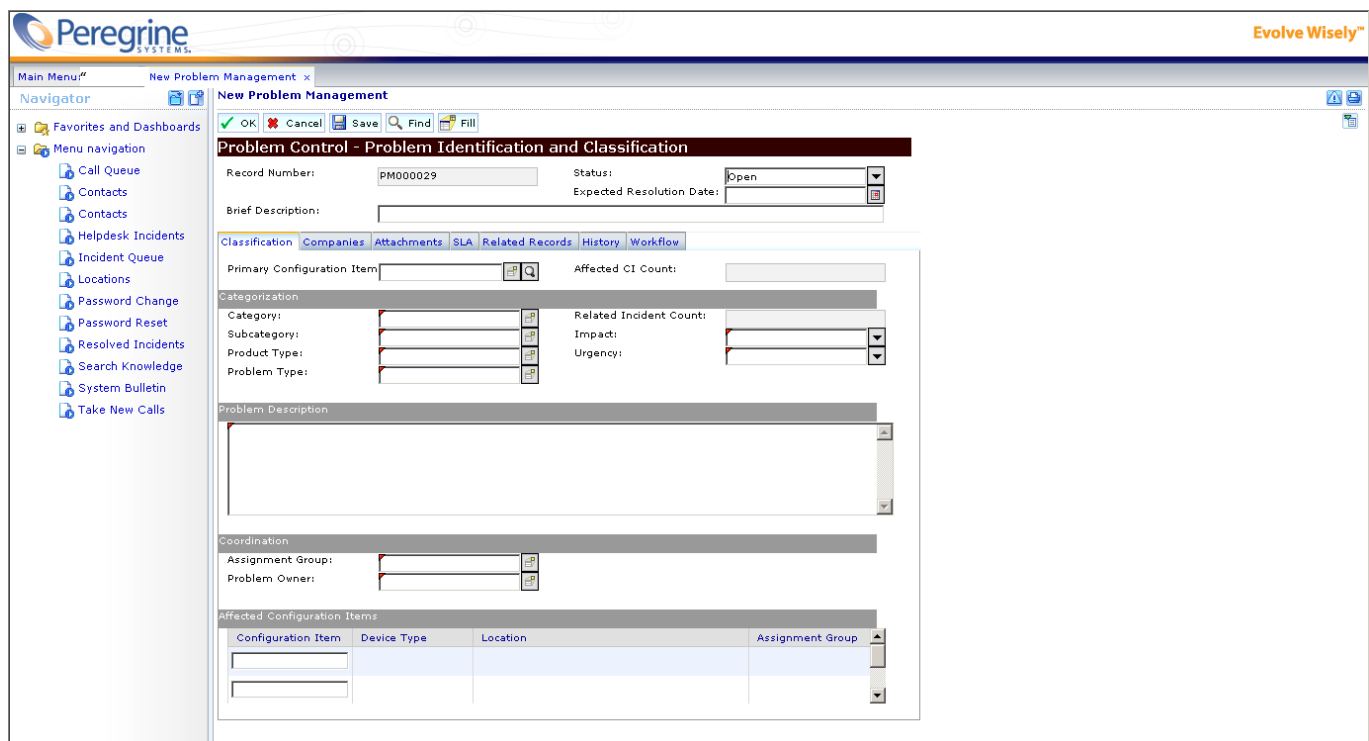
 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

2. Select the **Problem** Icon to jump to the **Problem Queue**, see arrow below.
3. Select **New** to open a Stand-Alone Problem.




 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

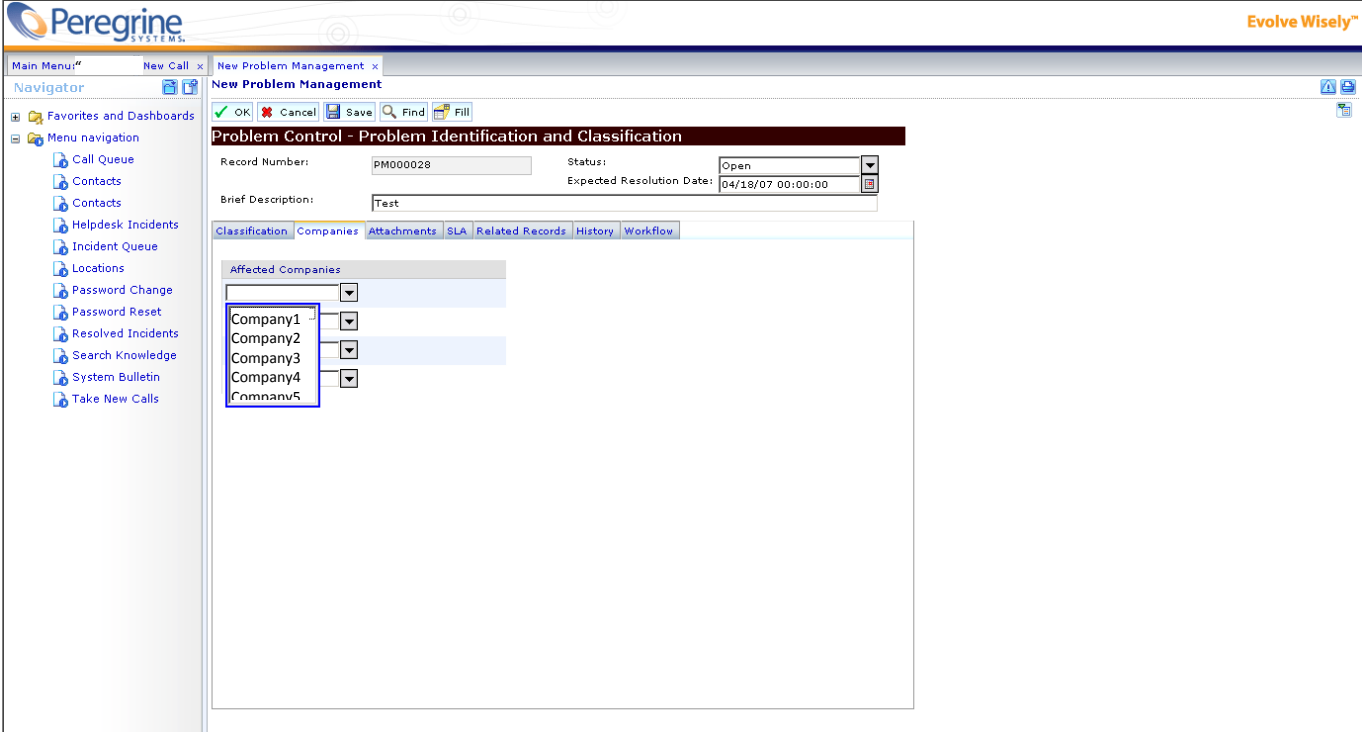
4. Fill out the details of the Problem; **Brief Description, Expected Resolution Date** and **Primary Configuration Item** (if known), **Category, Subcategory, Product Type, Problem Type, Impact, Urgency, Assignment Group** and **Problem Owner**.
5. Fill in the **Problem Description** with the details of the Problem, and any other known information.





 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

6. On the **Companies** tab, select any impacted 'companies'.



The screenshot shows the 'New Problem Management' window in the Peregrine Systems application. The 'Problem Control - Problem Identification and Classification' section is active. The 'Companies' tab is selected, displaying a list of 'Affected Companies'. The list includes 'Company1', 'Company2', 'Company3', 'Company4', and 'Company5'. 'Company1' is highlighted with a blue box. The 'Record Number' is 'PM000028', 'Status' is 'Open', and 'Expected Resolution Date' is '04/18/07 00:00:00'. The 'Brief Description' is 'Test'.

7. Click **Save** at the top of the screen. A message will state the Problem has been opened.

**Peregrine SYSTEMS** **Problem PM000029 has been opened.** **Evolve Wisely™**

Main Menu: New Problem Management x

Navigator

- Favorites and Dashboards
- Menu navigation
  - Call Queue
  - Contacts
  - Contacts
  - Helpdesk Incidents
  - Incident Queue
  - Locations
  - Password Change
  - Password Reset
  - Resolved Incidents
  - Search Knowledge
  - System Bulletin
  - Take New Calls

**New Problem Management**

OK Cancel Save Next Phase Find Fill

**Problem Control - Problem Identification and Classification**

Record Number: PM000029 Status: Open  
Expected Resolution Date: 04/26/07 00:00:00

Brief Description: Stand Alone Test

Classification Companies Activities Attachments SLA Related Records History Workflow

Primary Configuration Item: BobPC Affected CI Count:

**Categorization**

Category: SERVER Related Incident Count:  
Subcategory: HARDWARE - INSTALL Impact: 3 - Multiple Users  
Product Type: LINUX Urgency: 2 - High  
Problem Type: HARDWARE REQUEST Priority: 2 - High

**Problem Description**

Test for Stand-Alone Problem

**Coordination**

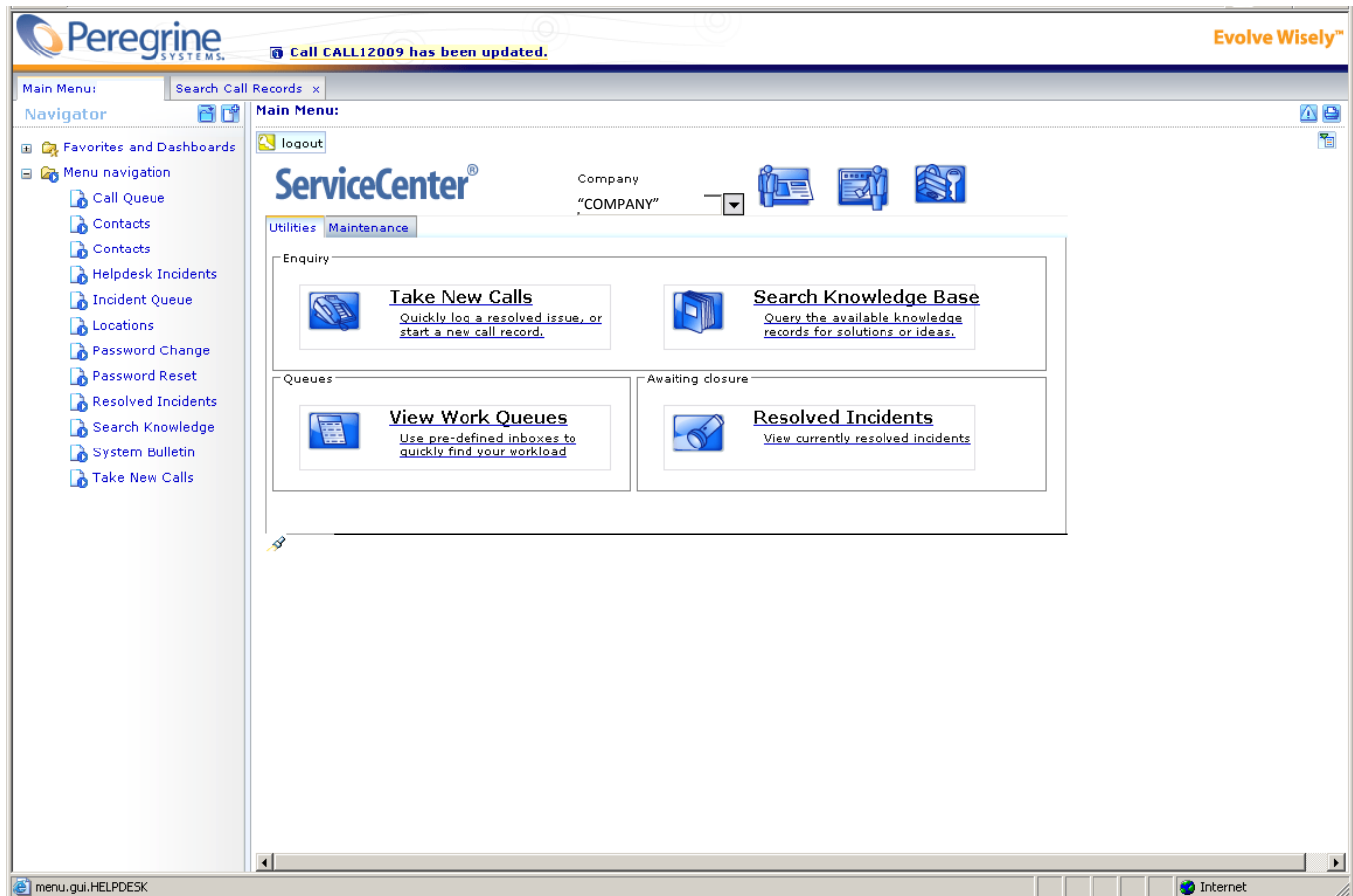
Assignment Group: 0741-NETWORK TECH  
Problem Owner: EITS MANAGER


**Affected Configuration Items**

Configuration Item	Device Type	Location	Assignment Group

## Lesson 4: Searching/Querying a Problem

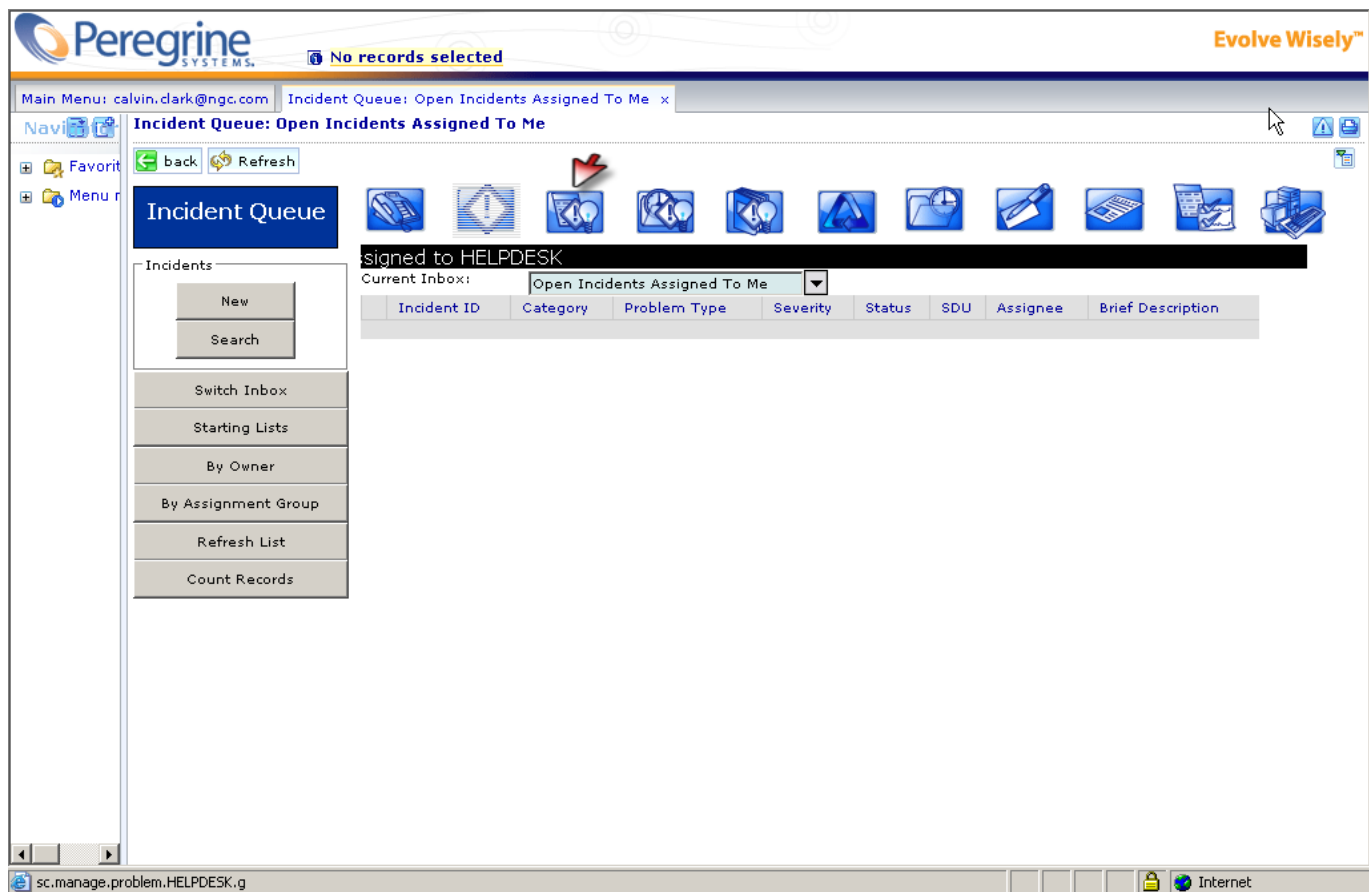
1. Begin at the main menu and select **View Work Queues**.



 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

Note: The following search screen will appear; the default screen is the **Incident Queue**.

2. Select the **Problem Icon** to jump to the **Problem Queue**, see arrow below.



Commercial, State and Local (CSL) group  
PROCEDURE

Document #:

**VITA-PDR-PM-XXXX**AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  
VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.

Revision:

1.5

Effective Date

04/01/2008


# Pages

50

3. Click on the gray **Search** button to open the search screen.

The screenshot displays the Peregrine Problem Management Queue. On the left is a 'Menu navigation' pane with options like Call Queue, Contacts, Helpdesk Incidents, Incident Queue, Locations, Password Change, Password Reset, Resolved Incidents, Search knowledge, System Bulletin, and Take New Calls. The main area is titled 'Problem Queue' and contains a 'Current Inbox' dropdown set to 'All Problem Tickets'. Below this is a table of problem tickets. A red mouse cursor is pointing at the 'Search' button in the 'Problems' section on the left.

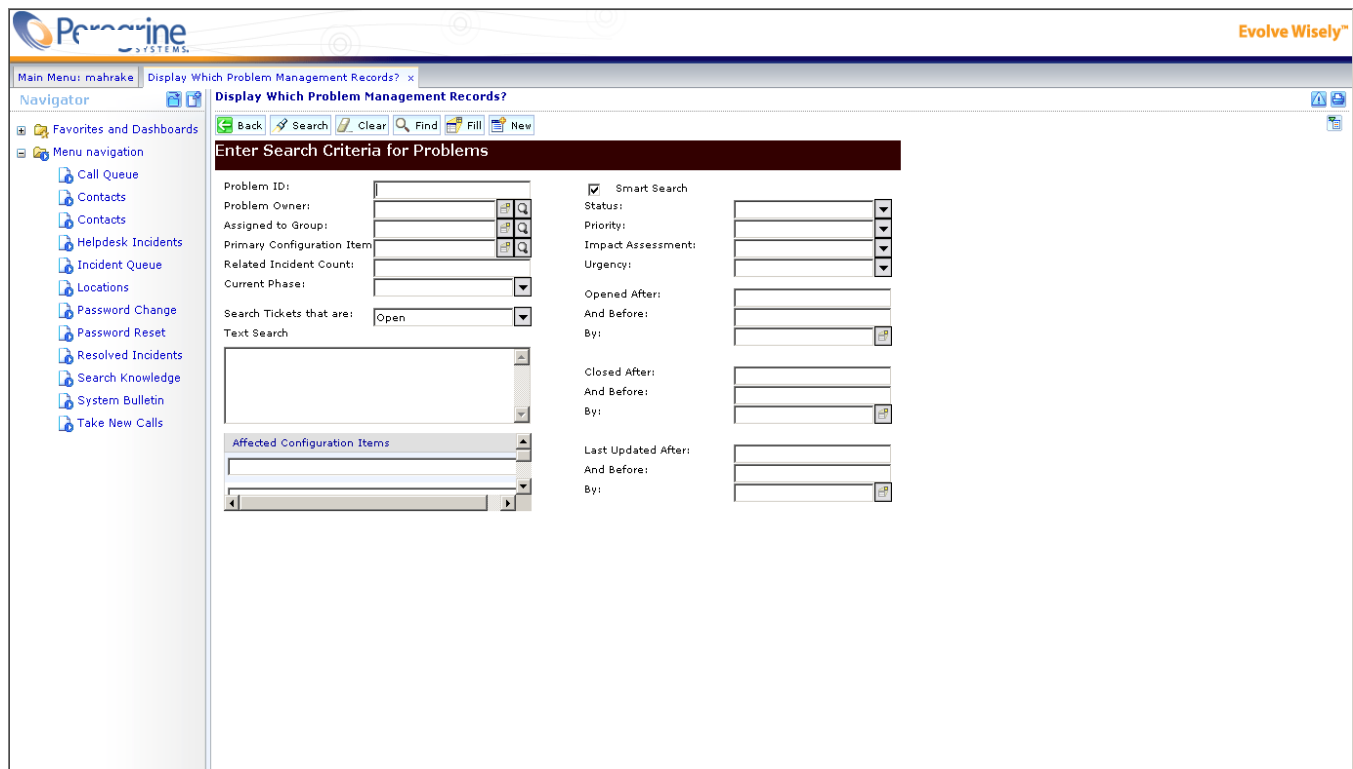
Problem ID	Category	Assignment	Status	Device	Brief Description
PM000015	ACCESS SECURITY/MODIFICATIONS	0550-CORPORATE SYS.	Open		TEST1
PM000012	ACCESS SECURITY/MODIFICATIONS	0504-SAP REQ	Work-In-Progress	DPC00005	TEST 1
PM000020	ACCESS SECURITY/MODIFICATIONS	0420-LAFAYETTE CSC	Open		testing problem management
PM000022	SERVER	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
PM000024	ACCESS SECURITY/MODIFICATIONS	0011-CORP PSM, MSMT.	Open		test
PM000025	ACCESS SECURITY/MODIFICATIONS	0420-LAFAYETTE CSC	Open		test
PM000027	SERVER	0914-BW1 ETC	Updated	ACME Phone 0004	Opened a problem as problem manager
PM000028	USER/DESKTOP	0489-PERRY HW	Open	ACMEpc015	Test
PM0001	network	LAR SUPPORT	Updated	ACMEpc012	Cannot access the internet.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

4. Enter the Problem ID number. Ex 000191, pm000191, PM000191 etc...

5. Click the search button at the top of the screen.

Note: A search can be performed by Problem ID number (if known), or use any other combination of available search fields.



The screenshot shows the 'Percegrine' web application interface. The top navigation bar includes the 'Percegrine' logo and the tagline 'Evolve Wisely™'. Below the navigation bar, there is a breadcrumb trail: 'Main Menu: mahrake > Display Which Problem Management Records?'. The main content area is titled 'Display Which Problem Management Records?' and contains a search form. The form is divided into two main sections: 'Enter Search Criteria for Problems' and 'Affected Configuration Items'. The 'Enter Search Criteria for Problems' section includes fields for 'Problem ID:', 'Problem Owner:', 'Assigned to Group:', 'Primary Configuration Item:', 'Related Incident Count:', 'Current Phase:', 'Search Tickets that are:', and 'Text Search'. There are also checkboxes for 'Smart Search' and 'Status:'. The 'Affected Configuration Items' section includes a list of configuration items. The interface also features a left-hand navigation menu with various links such as 'Call Queue', 'Contacts', 'Helpdesk Incidents', 'Incident Queue', 'Locations', 'Password Change', 'Password Reset', 'Resolved Incidents', 'Search Knowledge', 'System Bulletin', and 'Take New Calls'.

Commercial, State and Local (CSL) group  
PROCEDURE

Document #:

**VITA-PDR-PM-XXXX**AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  
VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.

Revision:

1.5

Effective Date

04/01/2008

# Pages

50

6. The following screen will appear;

Note: The gold bar with the **(PM ID)** link below which will identify the selected Problem Record.

Main Menu: calvin.dark@ngc.com Problem Management: PM000191

Problem Management: PM000191

OK Cancel Save Next Phase Find Fill

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000191	Problem Identification and Classification	CCC-HELPDESK MAILBOX	Open	CVADK-958738-883855868	(Clarica) Testing the Problem Management (Individual record) Training Manual

Problem Control - Problem Identification and Classification

Record Number: PM000191 Status: Open  
Expected Resolution Date: 02/04/08 10:00:00

Brief Description: ((Clarica) Testing the Problem Management (Individual record) Training Manual)

Classification Customers Activities Attachments SLA Related Records History Workflow

Primary Configuration Item: CVADK-958738-00331 Affected CI Count: 1

Category: mainframe  
Subcategory: development  
Product Type: all unitys products - soft  
Problem Type: none

Related Incident Count: 2 - Site/Dept  
Impact: 2 - Major  
Urgency: 2 - High  
Priority: 2 - High


Problem Description  
Testing individual problem process from the Problem training manual.

Coordination  
Assignment Group: CCC-HELPDESK MAILBOX  
Problem Owner: yvcc@vta.virginia.gov

Affected Configuration Items

Configuration Item	Device Type	Location	Assignment Group
--------------------	-------------	----------	------------------

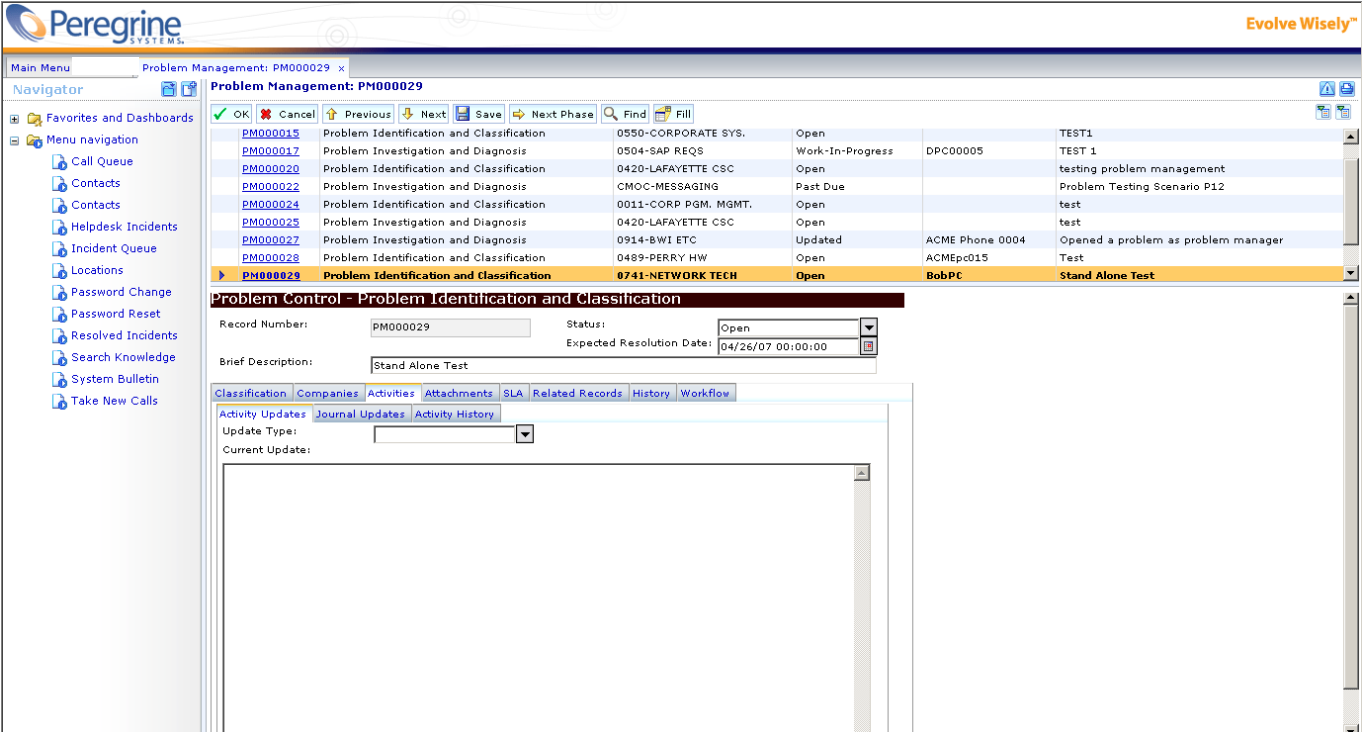
PM.pc.ident.and.class Internet

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #: 	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision: 	1.5
	Effective Date 	04/01/2008
	# Pages 	50

## Lesson 5: Updating a Problem and Move to Next Phase.

1. Locate the Problem Record to update by searching the **Problem Queue**.
2. Click the **Activities** tab. Select the **Update Type** drop down arrow and make the appropriate selection.
3. Enter the appropriate data in the **Current Update** field.


Note: At this point save the Problem Record. Continue with the following steps to move the record to the next phase.



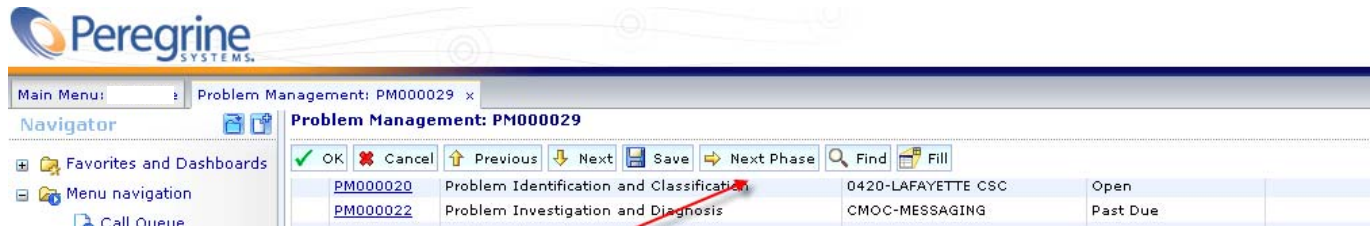
The screenshot displays the Peregrine Systems Problem Management interface. On the left is a navigation menu with options like 'Call Queue', 'Contacts', 'Incident Queue', and 'Locations'. The main area shows a table of problem records. The record PM000029 is highlighted, showing details such as 'Problem Identification and Classification', '0741-NETWORK TECH', 'Open' status, and 'Stand Alone Test' description. Below the table, there's a section for 'Problem Control - Problem Identification and Classification' with fields for 'Record Number' (PM000029), 'Status' (Open), and 'Expected Resolution Date' (04/26/07 00:00:00). At the bottom, there are tabs for 'Classification', 'Companies', 'Activities', 'Attachments', 'SLA', 'Related Records', 'History', and 'Workflow'. The 'Activities' tab is active, showing 'Update Type' and 'Current Update' fields.

Record Number	Description	Status	Expected Resolution Date	Comments
PM000015	Problem Identification and Classification	Open		TEST1
PM000017	Problem Investigation and Diagnosis	Work-In-Progress		TEST 1
PM000020	Problem Identification and Classification	Open		testing problem management
PM000022	Problem Investigation and Diagnosis	Past Due		Problem Testing Scenario P12
PM000024	Problem Identification and Classification	Open		test
PM000025	Problem Investigation and Diagnosis	Open		test
PM000027	Problem Investigation and Diagnosis	Updated		Opened a problem as problem manager
PM000028	Problem Identification and Classification	Open		Test
PM000029	Problem Identification and Classification	Open		Stand Alone Test



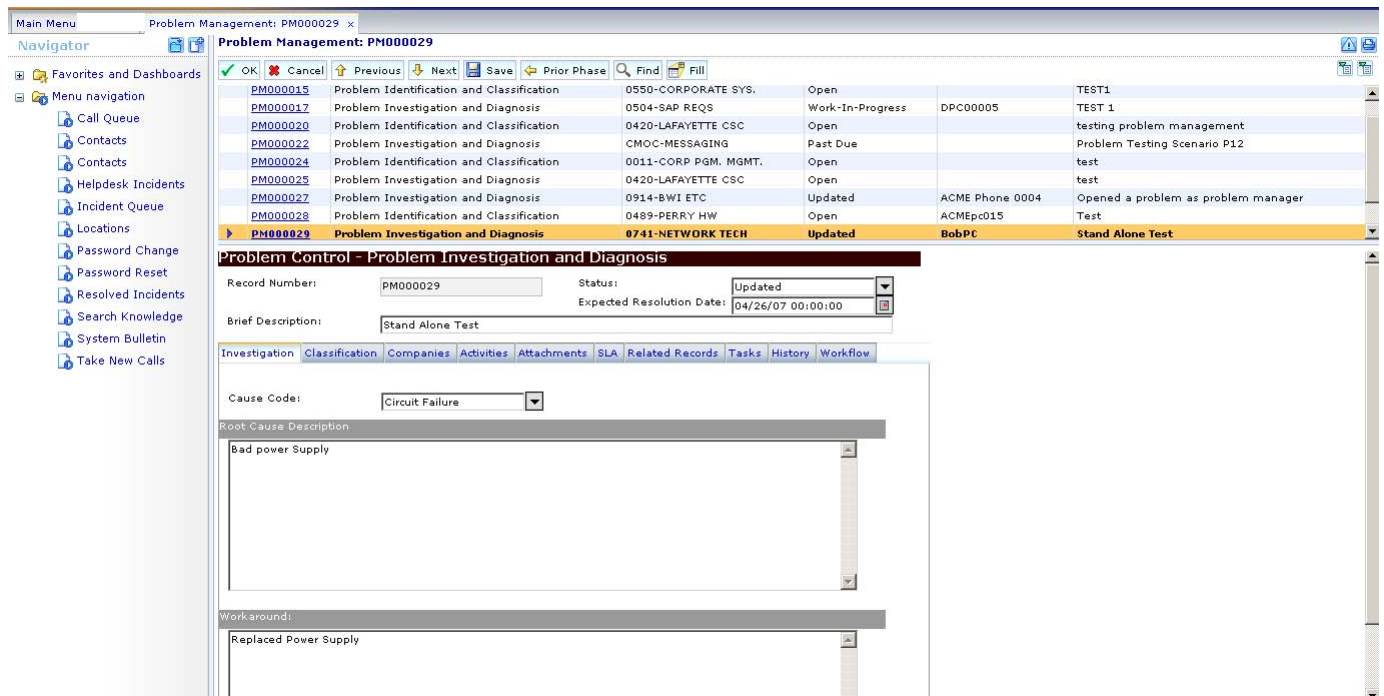
 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50


- To move the Problem to the next phase, click the **Next Phase** button.



Note: The **Investigation** tab is now assessable to update the **Root Cause** and **Workaround**.

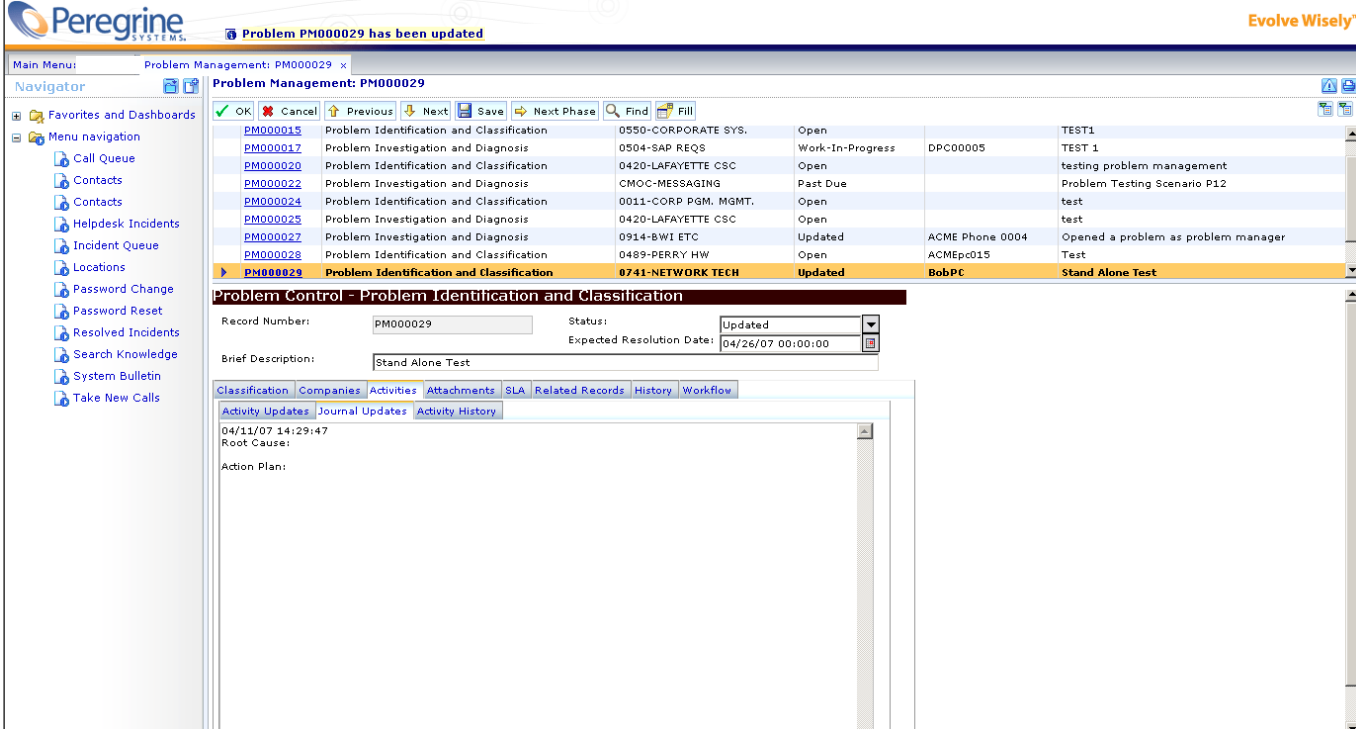
- Select the **Cause Code** from the drop down arrow menu.
- Enter the appropriate data in the **Root Cause** and **Workaround** fields.



 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

7. Click the **Save** button at the top of the screen.

Note: A Message at the top of the screen will show that the Problem has been updated.



**Peregrine SYSTEMS** Evolve Wisely™

Problem PM000029 has been updated

Main Menu: Problem Management: PM000029 x

Navigator: Problem Management: PM000029

OK Cancel Previous Next Save Next Phase Find Fill

Problem ID	Problem Identification and Classification	Classification	Status	Expected Resolution Date	Test
PM000015	Problem Identification and Classification	0550-CORPORATE SYS.	Open		TEST1
PM000017	Problem Investigation and Diagnosis	0504-SAP REQS	Work-In-Progress	DPC00005	TEST 1
PM000020	Problem Identification and Classification	0420-LAFAYETTE CSC	Open		testing problem management
PM000022	Problem Investigation and Diagnosis	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
PM000024	Problem Identification and Classification	0011-CORP PGM. MGMT.	Open		test
PM000025	Problem Investigation and Diagnosis	0420-LAFAYETTE CSC	Open		test
PM000027	Problem Investigation and Diagnosis	0914-BWI ETC	Updated	ACME Phone 0004	Opened a problem as problem manager
PM000028	Problem Identification and Classification	0489-PERRY HW	Open	ACMEpc015	Test
<b>PM000029</b>	<b>Problem Identification and Classification</b>	<b>0741-NETWORK TECH</b>	<b>Updated</b>	<b>BobPC</b>	<b>Stand Alone Test</b>

**Problem Control - Problem Identification and Classification**

Record Number: PM000029 Status: Updated

Expected Resolution Date: 04/26/07 00:00:00

Brief Description: Stand Alone Test


Classification Companies Activities Attachments SLA Related Records History Workflow

Activity Updates Journal Updates Activity History

04/11/07 14:29:47


Root Cause:

Action Plan:


 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## Lesson 6: Opening a Known Error and an RFC

1. Locate the Problem Record to open a Known Error from by searching the **Problem Queue**
2. There are two menu icons at the top right of the screen. The icon on the left is the **list** icon; the icon to the right is the **detail** icon. Click the **detail** icon.


3. Click on the Open Known Error Option from the Drop Down

Note: The **Open Known Error** option is not available, verify that the current phase is the **Investigation and Diagnosis** phase.



Problem Management: PM000029

Problem Management: PM000029

OK

Cancel

Previous

Next

Save

Prior Phase

Find

Fill

PM000015

Problem Identification and Classification

0550-CORPORATE SYS.

Open

PM000017

Problem Investigation and Diagnosis

0504-SAP REQ

Work-In-Progress

PM000020

Problem Identification and Classification

0420-LAFAYETTE CSC

Open

PM000022

Problem Investigation and Diagnosis

CMOC-MESSAGING

Past Due

PM000024

Problem Identification and Classification

0011-CORP PGM. MGMT.

Open

PM000025

Problem Investigation and Diagnosis

0420-LAFAYETTE CSC

Open

PM000027

Problem Investigation and Diagnosis

0914-BWI ETC

Updated

PM000028

Problem Identification and Classification

0489-PERRY HW

Open

PM000029

Problem Investigation and Diagnosis

0741-NETWORK TECH

Updated

TEST1

TEST 1

testing problem ma

Problem Testing So

test

Opened a problem

Test

Stand Alone Test

Detail Options

Undo

Get SLA/Entitlement

Set Reminder

Clone

Open Known Error

Create Hot News

Related

View Alert Log

Problem Control - Problem Investigation and Diagnosis

Record Number: PM000029

Status: Updated

Expected Resolution Date: 04/26/07 00:00:00

Brief Description: Stand Alone Test

Investigation

Classification

Companies

Activities

Attachments

SLA

Related Records

Tasks

History

Workflow

Cause Code: Circuit Failure

Root Cause Description: Bad power Supply

Workaround: Replaced Power Supply

ServiceCenter® 6.X Problem Management Training Manual.doc  
Northrop Grumman Private/Proprietary Level 1

Page 27 of 50

Commercial, State and Local (CSL) group  
PROCEDURE

Document #:

**VITA-PDR-PM-XXXX**AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  
VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.

Revision:

1.5

Effective Date

04/01/2008

# Pages

50

- The Error Control Screen will appear.
- Complete the **Expected Resolution Date** and verify the information carried over from the Classification tab.

**Peregrine SYSTEMS** Evolve Wisely™

Problem PM000029 has been updated

Main Menu New Known Errors x

Navigator

OK Cancel Add Find Fill

**Error Control - Error Assessment**

Record Number: KE0004 Status: Open

Expected Resolution Date:

Brief Description: Stand Alone Test

Classification Solution Companies Attachments Related Records History Workflow

Primary Configuration Item: BobPC

**Categorization**

Category: SERVER Impact: 3 - Multiple Users

Subcategory: HARDWARE - INSTALL Urgency: 2 - High

Product Type: LINUX

Problem Type: HARDWARE REQUEST


**Coordination**

Assignment Group: 0741-NETWORK TECH

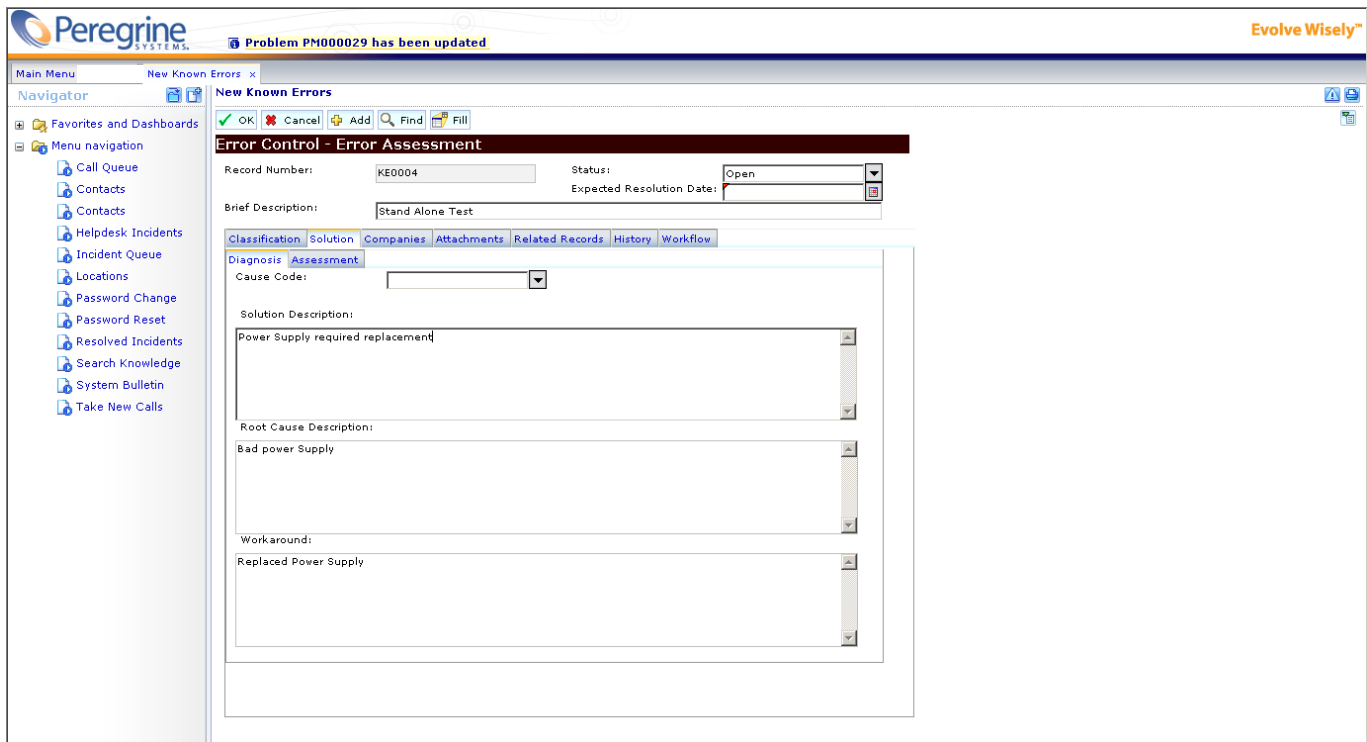
Problem Owner: EITS MANAGER

**Problem Description**

Test for Stand-Alone Problem

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

6. Click on the **Solutions** tab. Complete the **Diagnosis** and **Assessment** tabs.
7. When the Known Error is complete, click on the **Add** button at the top.



**Peregrine SYSTEMS** Problem PM000029 has been updated. Evolve Wisely™

Main Menu New Known Errors x

Navigator Favorites and Dashboards Menu navigation

- Call Queue
- Contacts
- Contacts
- Helpdesk Incidents
- Incident Queue
- Locations
- Password Change
- Password Reset
- Resolved Incidents
- Search Knowledge
- System Bulletin
- Take New Calls

**New Known Errors**

OK Cancel Add Find Fill

**Error Control - Error Assessment**

Record Number: KE0004 Status: Open

Expected Resolution Date:

Brief Description: Stand Alone Test

Classification Solution Companies Attachments Related Records History Workflow

Diagnosis Assessment

Cause Code:

Solution Description:

Power Supply required replacement

Root Cause Description:

Bad power Supply

Workaround:

Replaced Power Supply

8. A message will state the Known Error is associated with the Problem.

**Peregrine SYSTEMS** Evolve Wisely™

**Problem PM000029 associated with KE0004.**

Main Menu New Known Errors x

Navigator New Known Errors

OK Cancel Save Next Phase Find Fill

**Error Control - Error Assessment**

Record Number: KE0004 Status: Open  
Expected Resolution Date: 04/25/07 00:00:00

Brief Description: Stand Alone Test

Classification Solution Companies Activities Attachments Related Records History Workflow

Primary Configuration Item: BobPC

**Categorization**


Category: SERVER Impact: 3 - Multiple Users  
Subcategory: HARDWARE - INSTALL Urgency: 2 - High  
Product Type: LINUX Priority: 2 - High  
Problem Type: HARDWARE REQUEST

**Coordination**

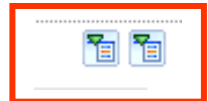
Assignment Group: 0741-NETWORK TECH  
Problem Owner: EITS MANAGER

**Problem Description**

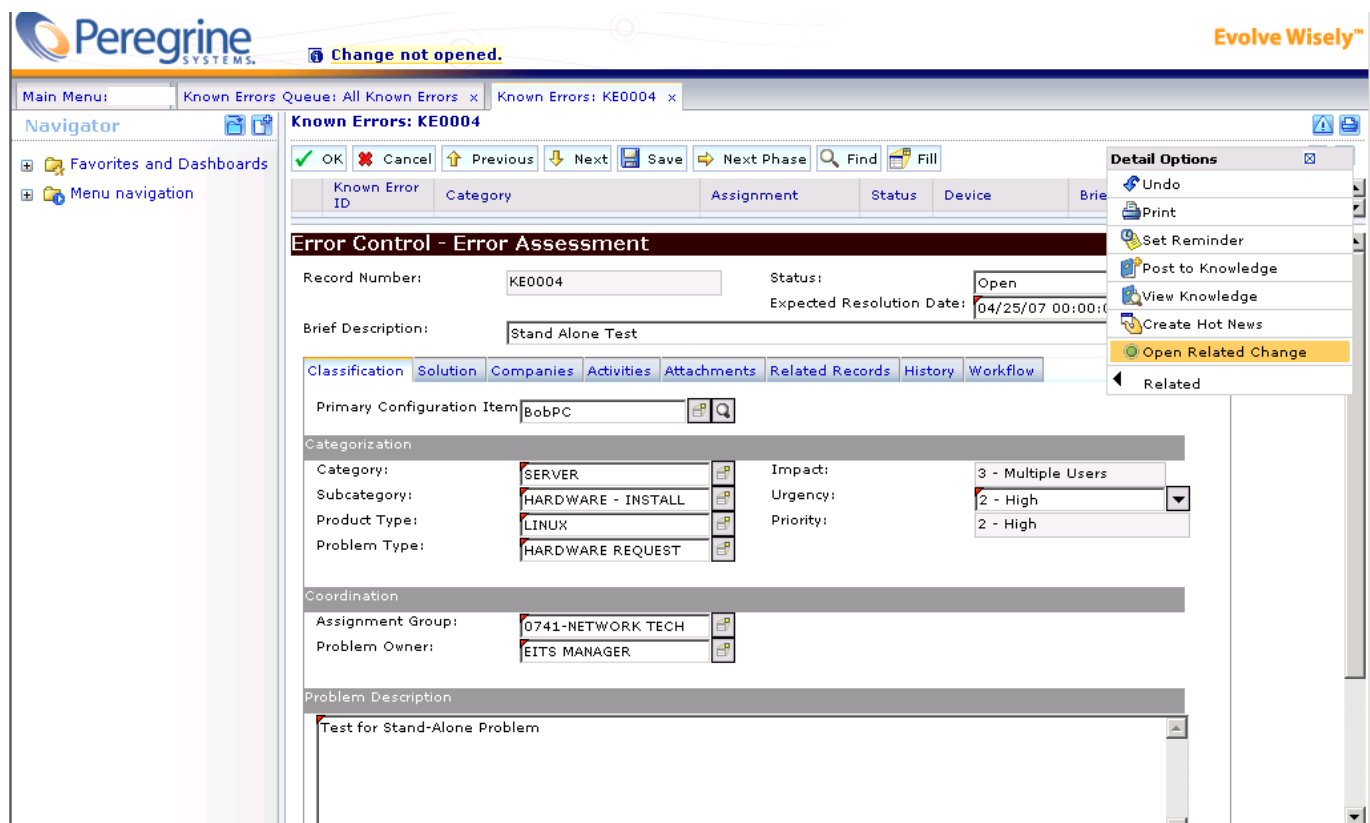
Test for Stand-Alone Problem

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #: 	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision: 	1.5
	Effective Date 	04/01/2008
	# Pages 	50

9. To request an RFC from an Error Record, select the **Detail** icon at the top right of the screen. The icon on the left is the **list** icon; the icon to the right is the **detail** icon. Click the **detail** icon.



10. Click on the **Open Related Change** option from the drop down menu.



**Peregrine SYSTEMS** Evolve Wisely™

Change not opened.

Main Menu: Known Errors Queue: All Known Errors x Known Errors: KE0004 x

Navigator: Favorites and Dashboards, Menu navigation


**Known Errors: KE0004**

OK Cancel Previous Next Save Next Phase Find Fill

Known Error ID	Category	Assignment	Status	Device	Brief
<b>Error Control - Error Assessment</b>					
Record Number:	KE0004		Status:	Open	
Brief Description:	Stand Alone Test		Expected Resolution Date:	04/25/07 00:00:00	
Classification Solution Companies Activities Attachments Related Records History Workflow					
Primary Configuration Item	BobPC				
<b>Categorization</b>					
Category:	SERVER	Impact:	3 - Multiple Users		
Subcategory:	HARDWARE - INSTALL	Urgency:	2 - High		
Product Type:	LINUX	Priority:	2 - High		
Problem Type:	HARDWARE REQUEST				
<b>Coordination</b>					
Assignment Group:	0741-NETWORK TECH				
Problem Owner:	EITS MANAGER				
<b>Problem Description</b>					
Test for Stand-Alone Problem					

**Detail Options**

- Undo
- Print
- Set Reminder
- Post to Knowledge
- View Knowledge
- Create Hot News
- Open Related Change**
- Related

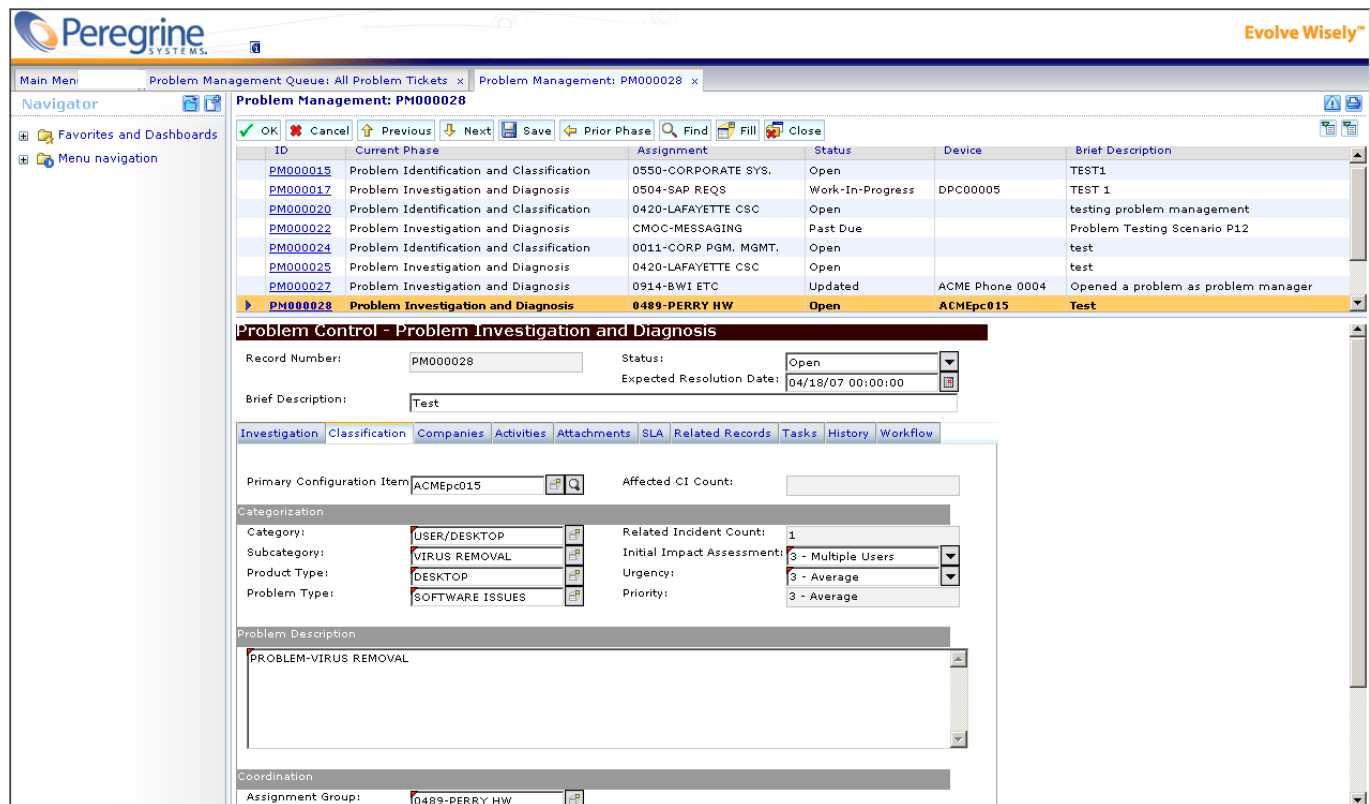
 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #: 	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## Lesson 7: Tasks

### A. Assigning a Task,

Note: A Task can be used with a Problem to assign work to one or more assignment group(s). Task are tracked as a sub-process of the Problem.


1. Select the Problem that the task will be created in.



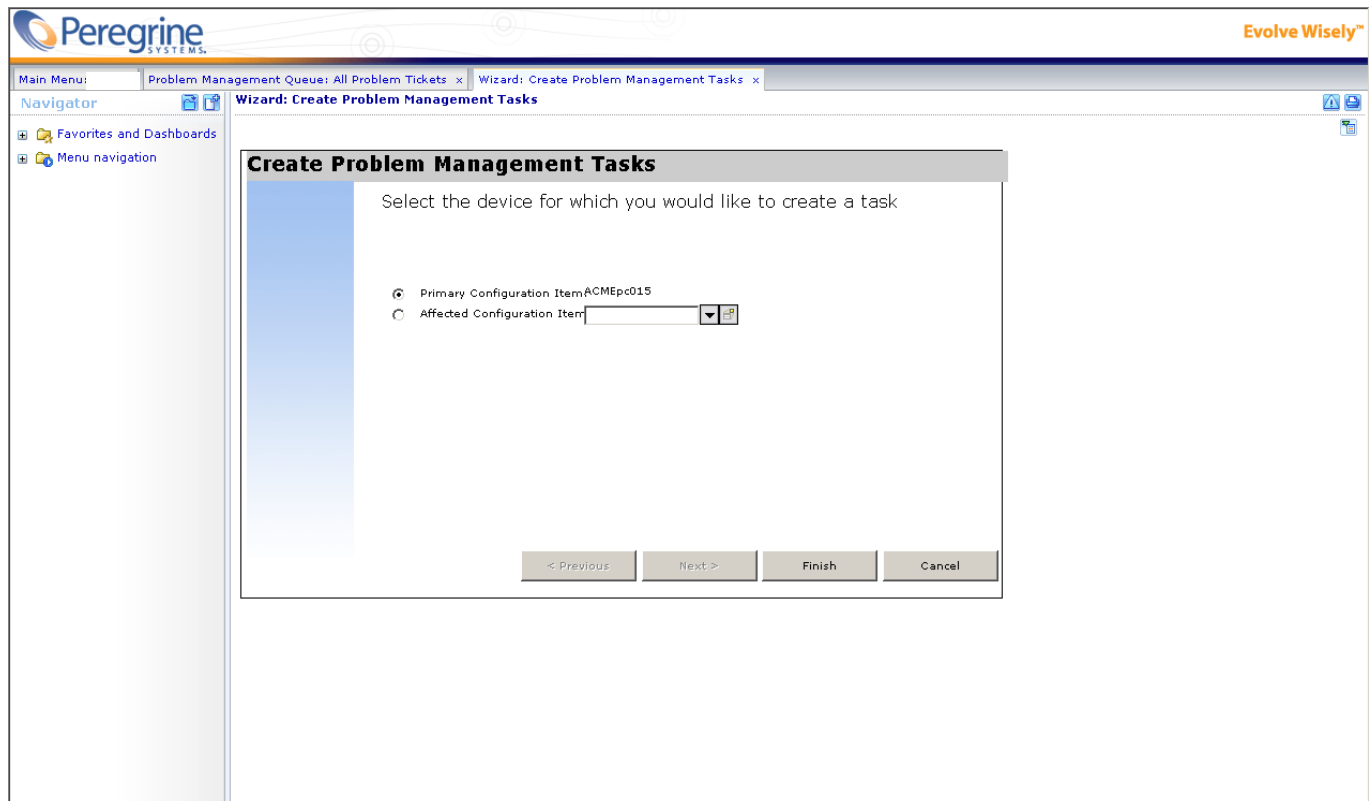
The screenshot displays the Peregrine Systems Problem Management interface. At the top, the 'Problem Management Queue: All Problem Tickets' and 'Problem Management: PM000028' are visible. The main table lists several problems, with PM000028 highlighted. Below the table, the 'Problem Control - Problem Investigation and Diagnosis' section is shown, containing fields for Record Number (PM000028), Status (Open), Expected Resolution Date (04/18/07 00:00:00), and Brief Description (Test). The 'Investigation' tab is active, showing a Primary Configuration Item (ACMEpc015) and Affected CI Count. The 'Categorization' section includes fields for Category (USER/DESKTOP), Subcategory (VIRUS REMOVAL), Product Type (DESKTOP), Problem Type (SOFTWARE ISSUES), Related Incident Count (1), Initial Impact Assessment (3 - Multiple Users), Urgency (3 - Average), and Priority (3 - Average). The 'Problem Description' field contains the text 'PROBLEM-VIRUS REMOVAL'. The 'Coordination' section at the bottom shows the Assignment Group (0489-PERRY HW).





 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

4. A Problem Management Task screen is displayed, prompting to select the current Configuration Item or to select a new one. Select the appropriate choice for the Task.



**Peregrine SYSTEMS** Evolve Wisely™


Main Menu: Problem Management Queue: All Problem Tickets x Wizard: Create Problem Management Tasks x

Navigator: Favorites and Dashboards Menu navigation

### Create Problem Management Tasks

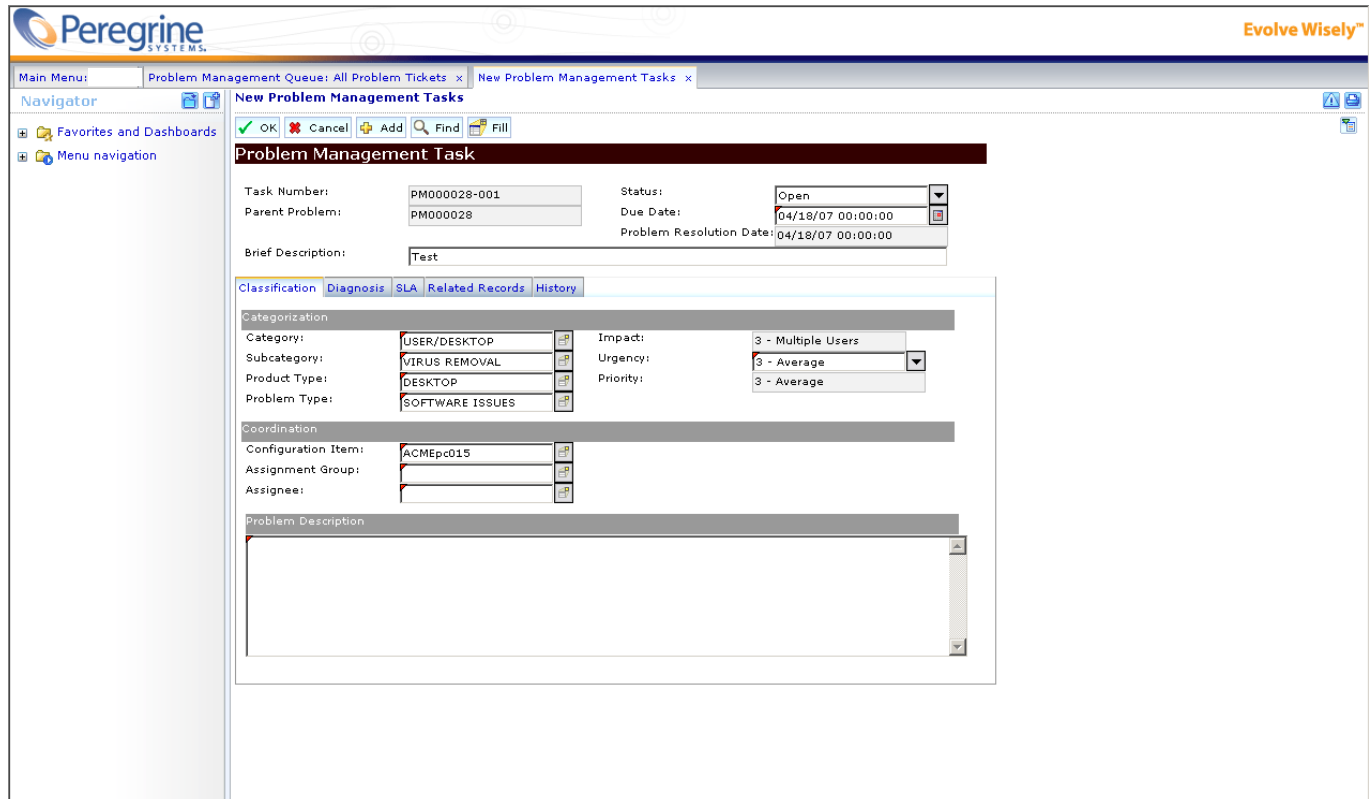
Select the device for which you would like to create a task


☒ Primary Configuration Item ACMEpc015  
☐ Affected Configuration Item ▼

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

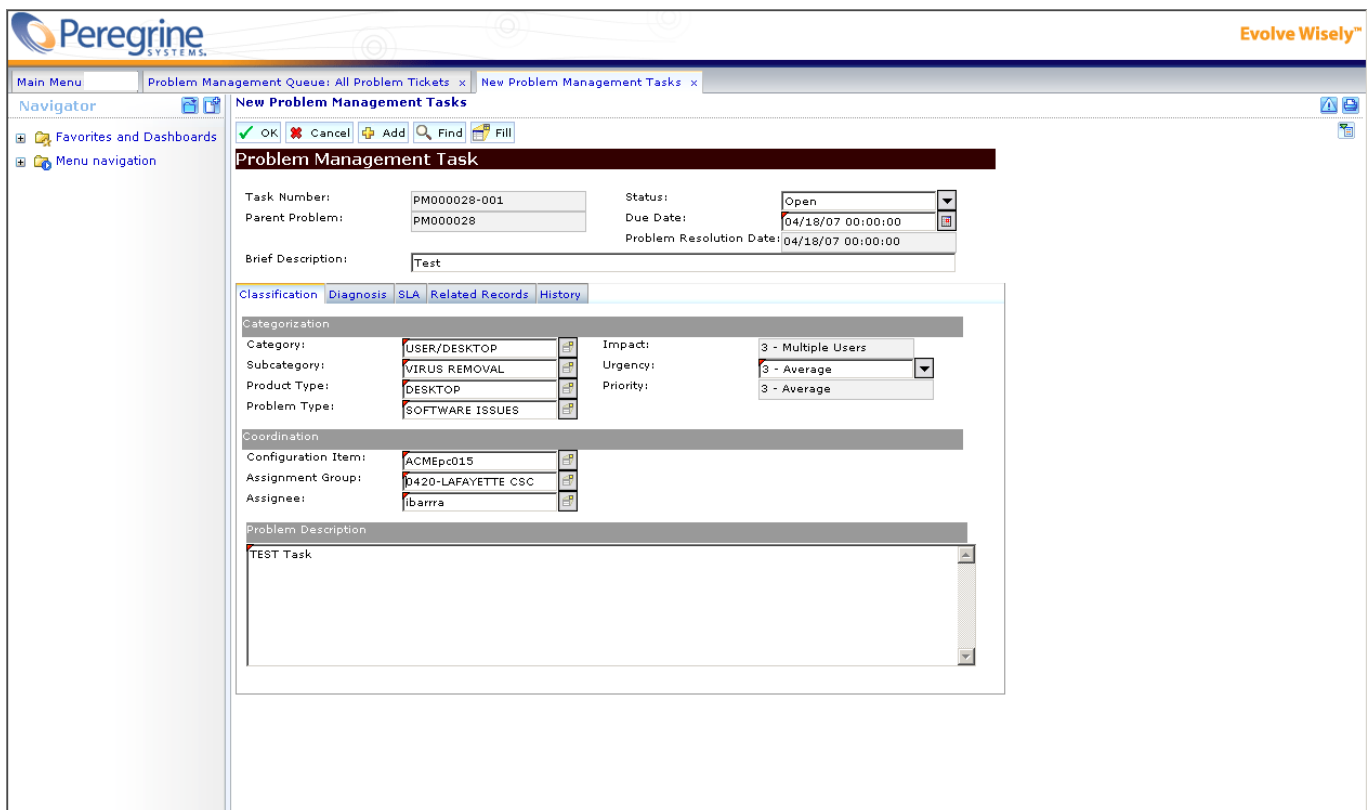
5. The new Problem Management Task screen is displayed.

Note: Information from the Problem is carried over into the Task and populated.



 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

6. Verify the pre-populated information in the Task, and correct if needed.
7. Add any additional information needed for the Task Assignee.
8. Update the Task with the Assignment Group and Assignee.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu | Problem Management Queue: All Problem Tickets x | New Problem Management Tasks x

Navigator | Favorites and Dashboards | Menu navigation

**New Problem Management Tasks**

OK Cancel Add Find Fill

**Problem Management Task**

Task Number: PM000028-001 Status: Open  
Parent Problem: PM000028 Due Date: 04/18/07 00:00:00  
Problem Resolution Date: 04/18/07 00:00:00  
Brief Description: Test

Classification | Diagnosis | SLA | Related Records | History

**Categorization**


Category: USER/DESKTOP Impact: 3 - Multiple Users  
Subcategory: VIRUS REMOVAL Urgency: 3 - Average  
Product Type: DESKTOP Priority: 3 - Average  
Problem Type: SOFTWARE ISSUES

**Coordination**

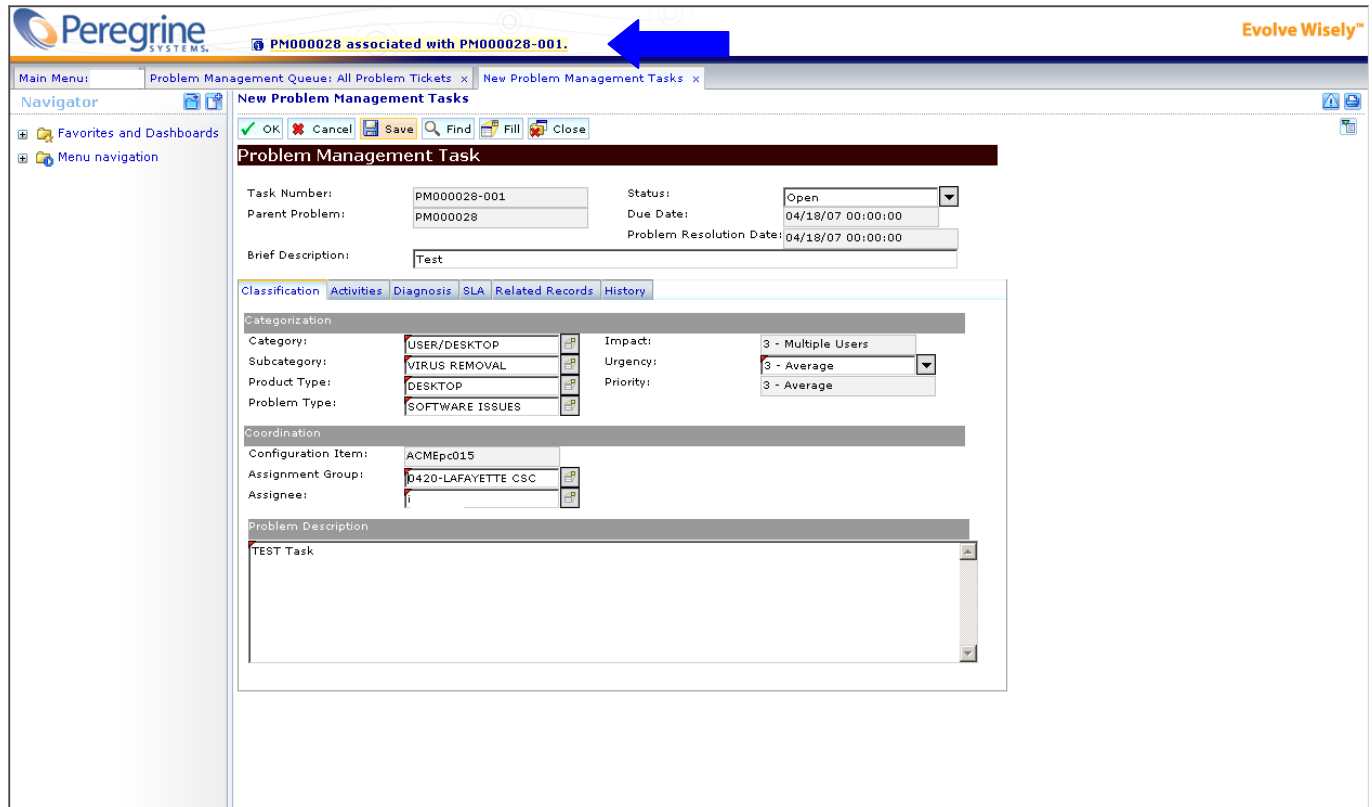
Configuration Item: ACMEpc015  
Assignment Group: 0420-LAFAYETTE CSC  
Assignee: lbarra

**Problem Description**

TEST Task

 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY.  VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

9. Click **Save** at the top of the screen. A message is displayed saying the Task is associated with the Problem.



**Peregrine SYSTEMS** PM000028 associated with PM000028-001. **Evolve Wisely™**

Main Menu: Problem Management Queue: All Problem Tickets x New Problem Management Tasks x

Navigator: Favorites and Dashboards Menu navigation

**New Problem Management Tasks**

OK Cancel Save Find Fill Close

**Problem Management Task**

Task Number: PM000028-001 Status: Open  
Parent Problem: PM000028 Due Date: 04/18/07 00:00:00  
Problem Resolution Date: 04/18/07 00:00:00  
Brief Description: Test

Classification Activities Diagnosis SLA Related Records History

**Categorization**


Category: USER/DESKTOP Impact: 3 - Multiple Users  
Subcategory: VIRUS REMOVAL Urgency: 3 - Average  
Product Type: DESKTOP Priority: 3 - Average  
Problem Type: SOFTWARE ISSUES

**Coordination**

Configuration Item: ACMEpc015  
Assignment Group: 0420-LAFAYETTE CSC  
Assignee: f


**Problem Description**

TEST Task

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

10. Click **OK** to exit the Task and return to the Problem.

Note: Multiple Tasks can be assigned to one or more Assignment Groups at this time.

 **Problem PM000028 has been updated** Evolve Wisely™

Main Menu | Problem Management Queue: All Problem Tickets x | Problem Management: PM000028 x

Navigator | Favorites and Dashboards | Menu navigation

**Problem Management: PM000028**

OK Cancel Previous Next Save Prior Phase Find Fill Close

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000015	Problem Identification and Classification	0550-CORPORATE SYS.	Open		TEST1
PM000017	Problem Investigation and Diagnosis	0504-SAP REQS	Work-In-Progress	DPC00005	TEST 1
PM000020	Problem Identification and Classification	0420-LAFAYETTE CSC	Open		testing problem management
PM000022	Problem Investigation and Diagnosis	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
PM000024	Problem Identification and Classification	0011-CORP PGM. MGMT.	Open		test
PM000025	Problem Investigation and Diagnosis	0420-LAFAYETTE CSC	Open		test
PM000027	Problem Investigation and Diagnosis	0914-BWI ETC	Updated	ACME Phone 0004	Opened a problem as problem manager
<b>PM000028</b>	<b>Problem Investigation and Diagnosis</b>	<b>0489-PERRY HW</b>	<b>Open</b>	<b>ACMEpc015</b>	<b>Test</b>

**Problem Control - Problem Investigation and Diagnosis**

Record Number: PM000028 Status: Open  
Expected Resolution Date: 04/18/07 00:00:00

Brief Description: Test

Investigation Classification Companies Activities Attachments SLA Related Records Tasks History Workflow

Primary Configuration Item: ACMEpc015 Affected CI Count:

**Categorization**


Category: USER/DESKTOP Related Incident Count: 1  
Subcategory: VIRUS REMOVAL Initial Impact Assessment: 3 - Multiple Users  
Product Type: DESKTOP Urgency: 3 - Average  
Problem Type: SOFTWARE ISSUES Priority: 3 - Average

**Problem Description**


PROBLEM-VIRUS REMOVAL

**Coordination**

Assignment Group:

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

11. Verify the Task was added by clicking on the **Tasks** tab.

 **Problem PM000028 has been updated** Evolve Wisely™

Main Menu: Problem Management Queue: All Problem Tickets x Problem Management: PM000028 x

Navigator: Favorites and Dashboards Menu navigation

**Problem Management: PM000028**

OK Cancel Previous Next Save Prior Phase Find Fill Close

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000015	Problem Identification and Classification	0550-CORPORATE SYS.	Open		TEST1
PM000017	Problem Investigation and Diagnosis	0504-SAP REQS	Work-In-Progress	DPC00005	TEST 1
PM000020	Problem Identification and Classification	0420-LAFAYETTE CSC	Open		testing problem management
PM000022	Problem Investigation and Diagnosis	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
PM000024	Problem Identification and Classification	0011-CORP PGM. MGMT.	Open		test
PM000025	Problem Investigation and Diagnosis	0420-LAFAYETTE CSC	Open		test
PM000027	Problem Investigation and Diagnosis	0914-BWI ETC	Updated	ACME Phone 0004	Opened a problem as problem manager
<b>PM000028</b>	<b>Problem Investigation and Diagnosis</b>	<b>0489-PERRY HW</b>	<b>Open</b>	<b>ACMEpc015</b>	<b>Test</b>


**Problem Control - Problem Investigation and Diagnosis**

Record Number: PM000028 Status: Open  
Expected Resolution Date: 04/18/07 00:00:00

Brief Description: Test

Investigation Classification Companies Activities Attachments SLA Related Records **Tasks** History Workflow



Task ID	Status	Assignee	Configuration Item
PM000028-001	Open		ACMEpc015

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## B. Completing a Problem Task

Note: If already in the Problem ticket, access the Task from the **Task** tab.

### Problem Control - Problem Investigation and Diagnosis

Record Number:	<input type="text" value="PM000028"/>	Status:	<input type="text" value="Open"/>	
		Expected Resolution Date:	<input type="text" value="04/18/07 00:00:00"/>	
Brief Description:	<input type="text" value="Test"/>			

Investigation

Classification

Companies

Activities

Attachments


SLA

Related Records


Tasks

History

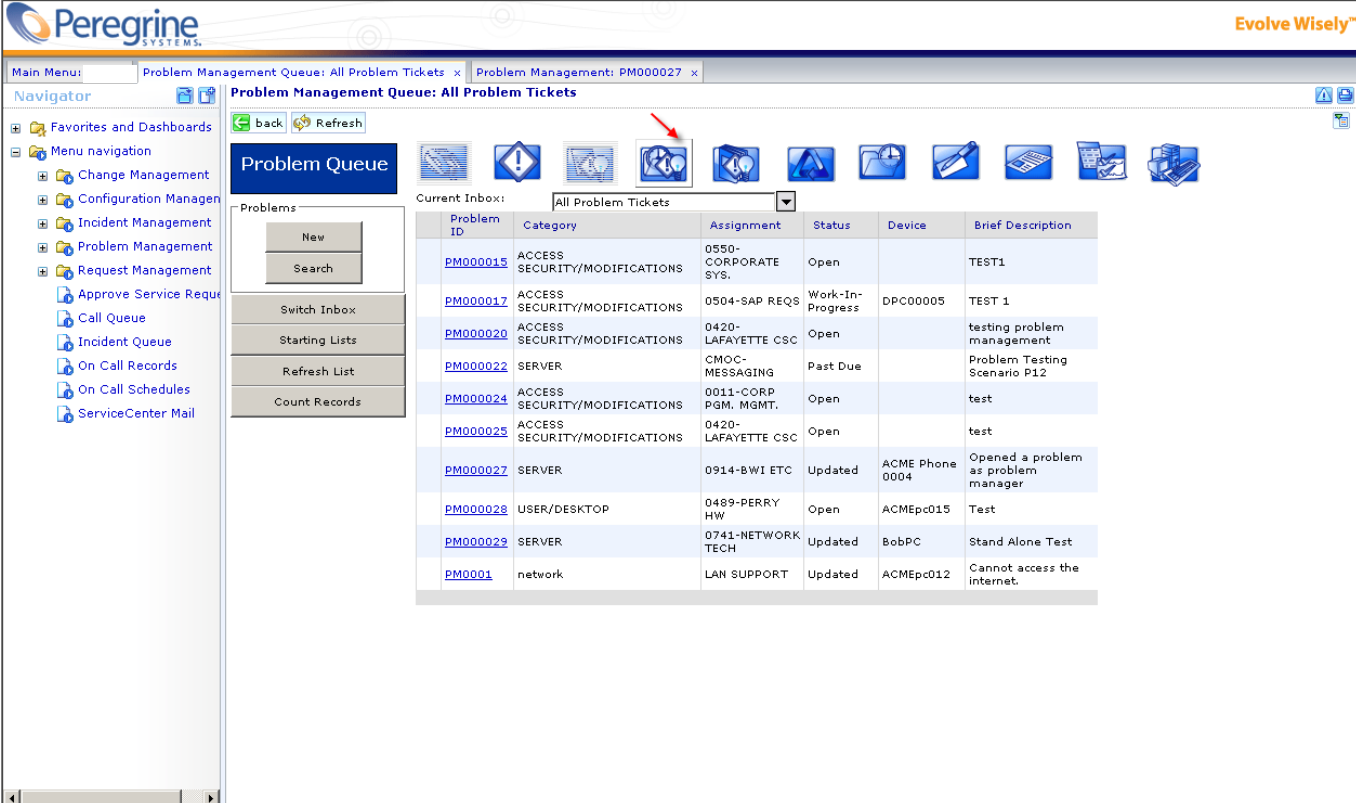
Workflow

Task ID	Status	Assignee	Configuration Item
<a href="#">PM000028-001</a>	Open		ACMEpc015



 <p>Commercial, State and Local (CSL) group <b>PROCEDURE</b></p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

1. To check for assigned Task, select the **Problem Management Task List** from the main menu.



**Problem Management Queue: All Problem Tickets**

Current Inbox: All Problem Tickets

Problem ID	Category	Assignment	Status	Device	Brief Description
<a href="#">PM000015</a>	ACCESS SECURITY/MODIFICATIONS	0550-CORPORATE SYS.	Open		TEST1
<a href="#">PM000017</a>	ACCESS SECURITY/MODIFICATIONS	0504-SAP REQS	Work-In-Progress	DPC00005	TEST 1
<a href="#">PM000020</a>	ACCESS SECURITY/MODIFICATIONS	0420-LAFAYETTE CSC	Open		testing problem management
<a href="#">PM000022</a>	SERVER	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
<a href="#">PM000024</a>	ACCESS SECURITY/MODIFICATIONS	0011-CORP PGM. MGMT.	Open		test
<a href="#">PM000025</a>	ACCESS SECURITY/MODIFICATIONS	0420-LAFAYETTE CSC	Open		test
<a href="#">PM000027</a>	SERVER	0914-BWI ETC	Updated	ACME Phone 0004	Opened a problem as problem manager
<a href="#">PM000028</a>	USER/DESKTOP	0489-PERRY HW	Open	ACMEpc015	Test
<a href="#">PM000029</a>	SERVER	0741-NETWORK TECH	Updated	BobPC	Stand Alone Test
<a href="#">PM0001</a>	network	LAN SUPPORT	Updated	ACMEpc012	Cannot access the internet.

2. A list of all Tasks assigned is displayed. Select the Task to work on.

**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: Problem Management Tasks Queue: Problem Management Tasks Assigned to Me x

Problem Management Tasks Queue: Problem Management Tasks Assigned to Me

back Refresh

**Problem Task Queue**

Current Inbox: Problem Management Tasks Assigned

Task ID	Category	Assignment	Status	Device	Brief Description
<a href="#">PM000027-001</a>	SERVER	0089-MIS MGMT	Open	ACME Phone 0004	Opened a problem as problem manager

Search


Switch Inbox

Starting Lists

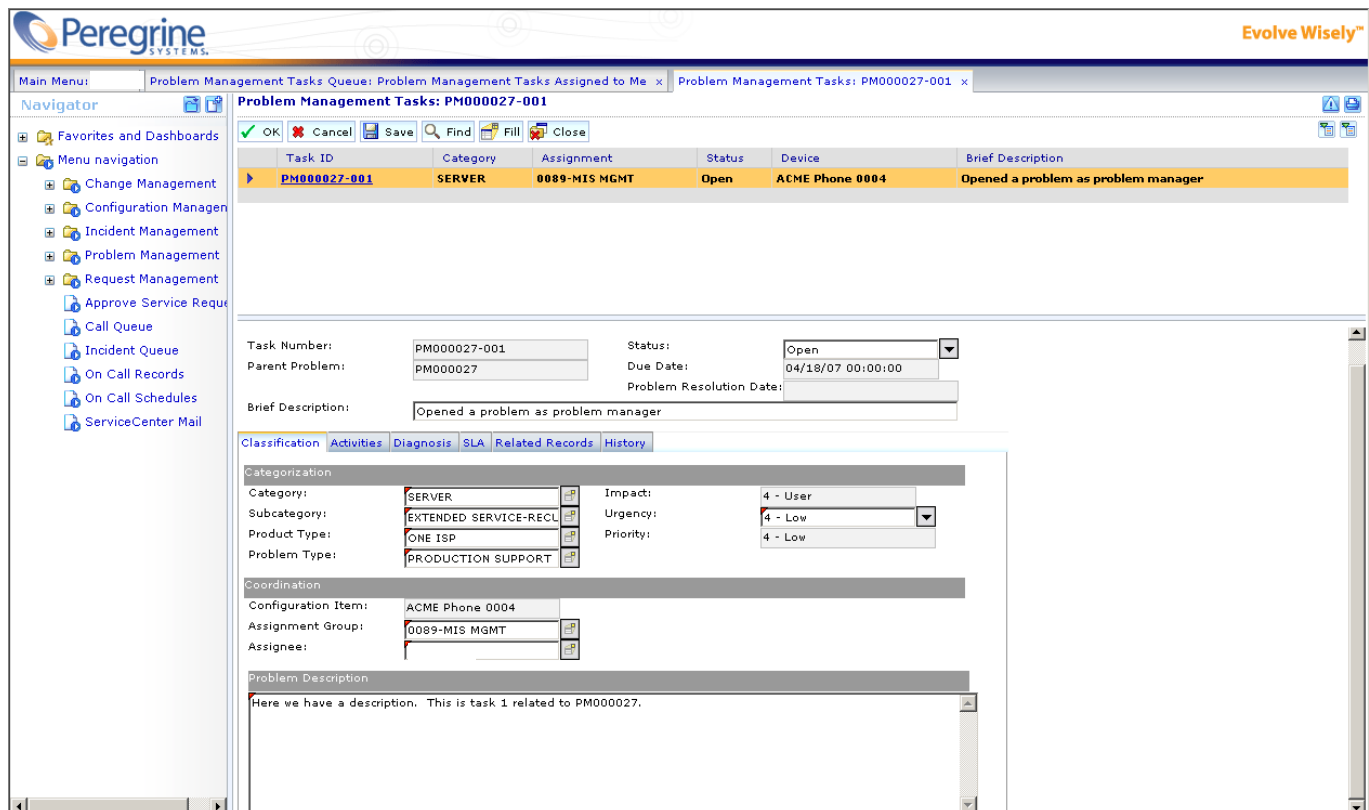
Refresh List

Count Records

ServiceCenter Mail

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50


3. The Task is displayed with its current status.



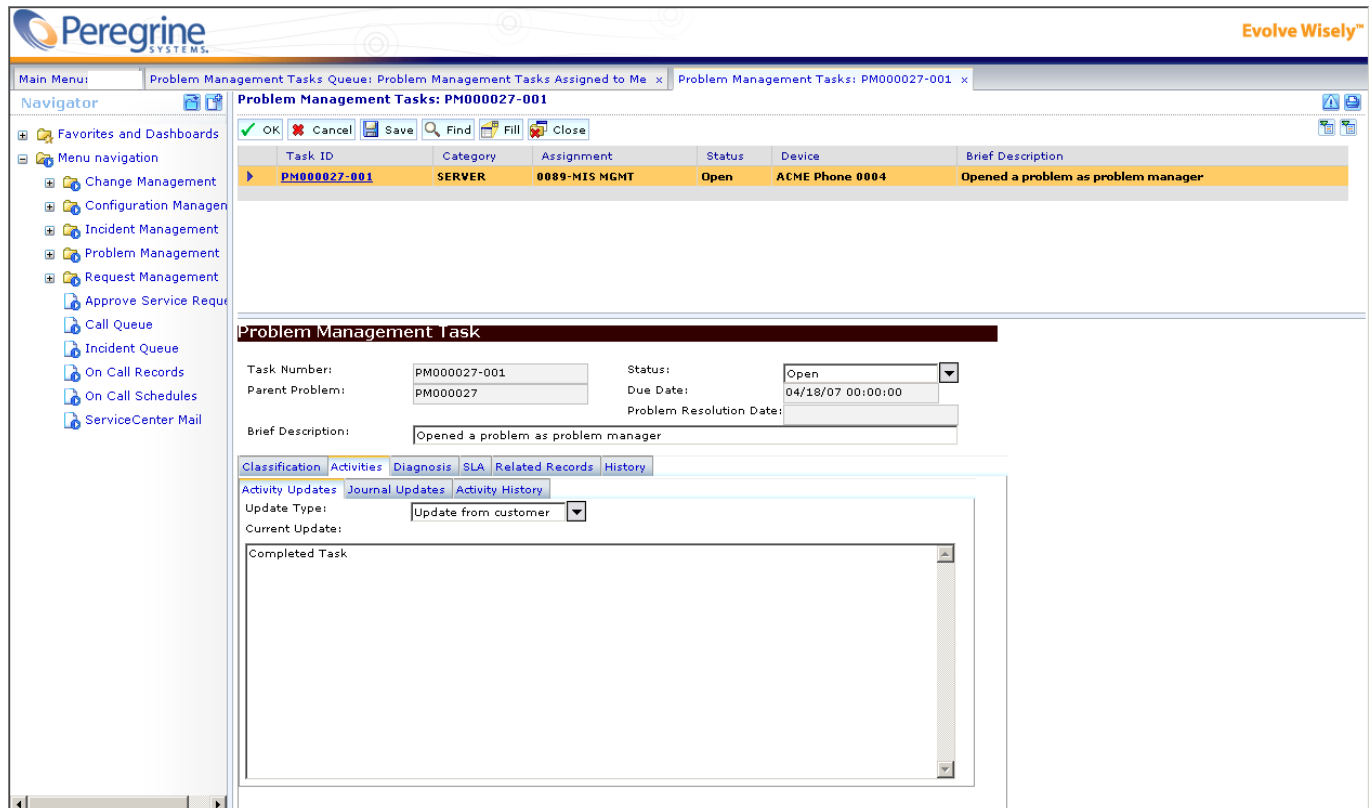
The screenshot displays the Peregrine Systems Problem Management interface. The top navigation bar includes the Peregrine logo and the tagline "Evolve Wisely™". The main menu shows "Problem Management Tasks Queue: Problem Management Tasks Assigned to Me" and "Problem Management Tasks: PM000027-001". The left sidebar contains a "Navigator" with various menu items like "Change Management", "Configuration Manager", "Incident Management", "Problem Management", "Request Management", "Approve Service Request", "Call Queue", "Incident Queue", "On Call Records", "On Call Schedules", and "ServiceCenter Mail".

The main content area shows the details for task "PM000027-001". It includes a table with columns: Task ID, Category, Assignment, Status, Device, and Brief Description. The task is listed as "PM000027-001" with Category "SERVER", Assignment "0089-MIS MGMT", Status "Open", Device "ACME Phone 0004", and Brief Description "Opened a problem as problem manager".

Below the table, there are fields for Task Number (PM000027-001), Parent Problem (PM000027), Status (Open), Due Date (04/18/07 00:00:00), Problem Resolution Date, and Brief Description (Opened a problem as problem manager). The "Classification" tab is active, showing details for Categorization (Category: SERVER, Subcategory: EXTENDED SERVICE-RECL, Product Type: ONE ISP, Problem Type: PRODUCTION SUPPORT), Coordination (Configuration Item: ACME Phone 0004, Assignment Group: 0089-MIS MGMT, Assignee: ), and Problem Description (Here we have a description. This is task 1 related to PM000027).

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	VITA-PDR-PM-XXXX
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

4. Update the Task with new information on the **Activities** tab.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: Problem Management Tasks Queue: Problem Management Tasks Assigned to Me x Problem Management Tasks: PM000027-001 x

Problem Management Tasks: PM000027-001

Task ID	Category	Assignment	Status	Device	Brief Description
PM000027-001	SERVER	0089-MIS MGMT	Open	ACME Phone 0004	Opened a problem as problem manager

**Problem Management Task**


Task Number: PM000027-001 Status: Open  
 Parent Problem: PM000027 Due Date: 04/18/07 00:00:00  
 Problem Resolution Date:   
 Brief Description: Opened a problem as problem manager

Classification Activities Diagnosis SLA Related Records History

Activity Updates Journal Updates Activity History

Update Type: Update from customer  
 Current Update:   
 Completed Task:

5. When the Task is complete, it can be closed by clicking the **Close** button.

 **Problem Management Task PM000027-001 has been closed** Evolve Wisely™

Main Menu: Problem Management Tasks Queue: Problem Management Tasks Assigned to Me x Problem Management Tasks: PM000027-001 x

Navigator: Favorites and Dashboards, Menu navigation, Change Management, Configuration Manager, Incident Management, Problem Management, Request Management, Approve Service Request, Call Queue, Incident Queue, On Call Records, On Call Schedules, ServiceCenter Mail

**Problem Management Tasks: PM000027-001**

Task ID	Category	Assignment	Status	Device	Brief Description
PM000027-001	SERVER	0089-MIS MGMT	Closed	ACME Phone 0004	Opened a problem as problem manager

**Problem Management Task**

Task Number: PM000027-001 Status: Closed  
Parent Problem: PM000027 Due Date: 04/18/07 00:00:00  
Brief Description: Opened a problem as problem manager  
Problem Resolution Date:

Classification Activities Diagnosis SLA Related Records History

**Categorization**


Category:	SERVER	Impact:	4 - User
Subcategory:	EXTENDED SERVICE-RECU	Urgency:	4 - Low
Product Type:	ONE ISP	Priority:	4 - Low
Problem Type:	PRODUCTION SUPPORT		

**Coordination**

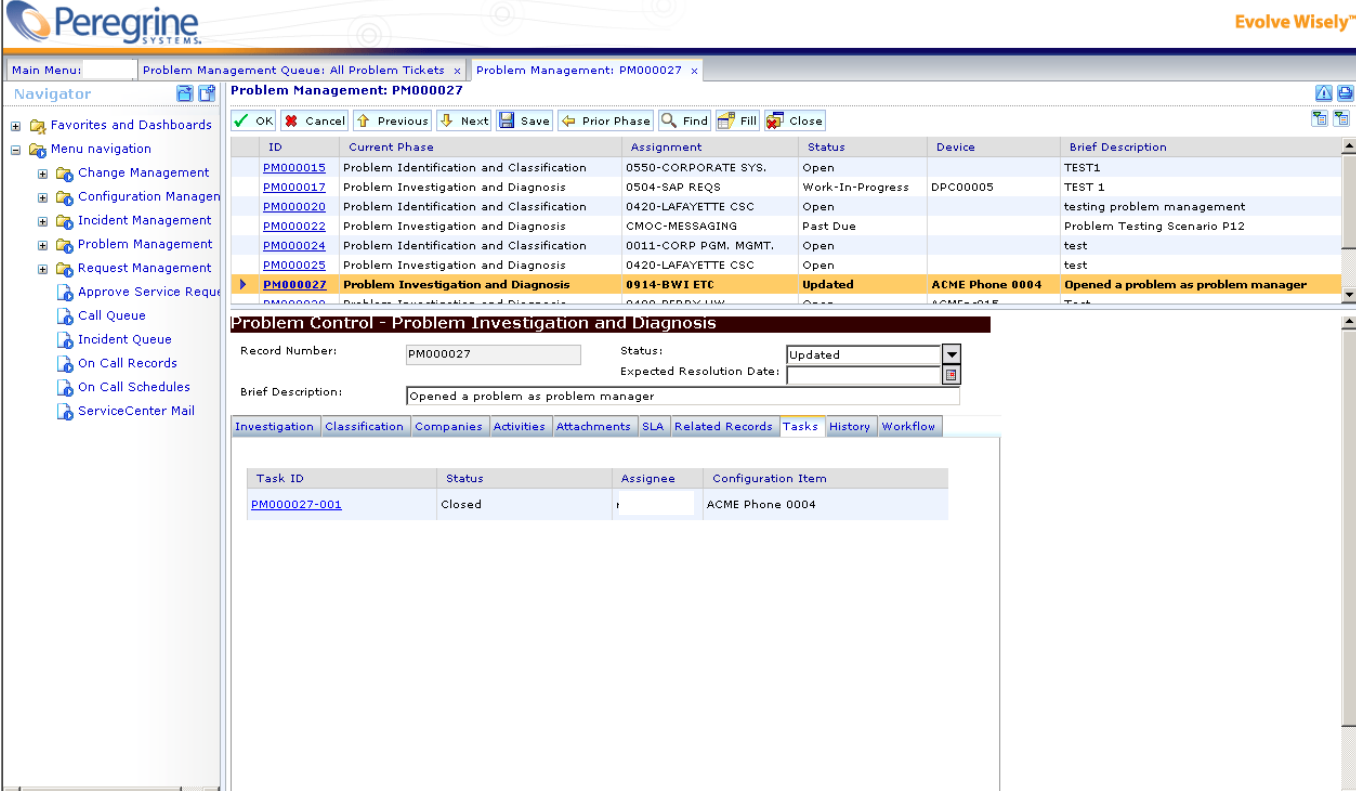
Configuration Item:	ACME Phone 0004
Assignment Group:	0089-MIS MGMT
Assignee:	

**Problem Description**

Here we have a description. This is task 1 related to PM000027.

 <p>Commercial, State and Local (CSL) group <b>PROCEDURE</b></p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

6. To verify any additional task or task closure, select the **Tasks** tab.



**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: Problem Management Queue: All Problem Tickets x Problem Management: PM000027 x

Problem Management: PM000027

OK Cancel Previous Next Save Prior Phase Find Fill Close

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000015	Problem Identification and Classification	0550-CORPORATE SYS.	Open		TEST1
PM000017	Problem Investigation and Diagnosis	0504-SAP REQS	Work-In-Progress	DPC00005	TEST 1
PM000020	Problem Identification and Classification	0420-LAFAYETTE CSC	Open		testing problem management
PM000022	Problem Investigation and Diagnosis	CMOC-MESSAGING	Past Due		Problem Testing Scenario P12
PM000024	Problem Identification and Classification	0011-CORP PGM. MGMT.	Open		test
PM000025	Problem Investigation and Diagnosis	0420-LAFAYETTE CSC	Open		test
PM000027	<b>Problem Investigation and Diagnosis</b>	<b>0914-BWI ETC</b>	<b>Updated</b>	<b>ACME Phone 0004</b>	<b>Opened a problem as problem manager</b>
PM000028	Problem Investigation and Diagnosis	0400-DEFCON LHM	Open	ACME-015	Task


**Problem Control - Problem Investigation and Diagnosis**

Record Number: PM000027 Status: Updated  
Expected Resolution Date:

Brief Description: Opened a problem as problem manager

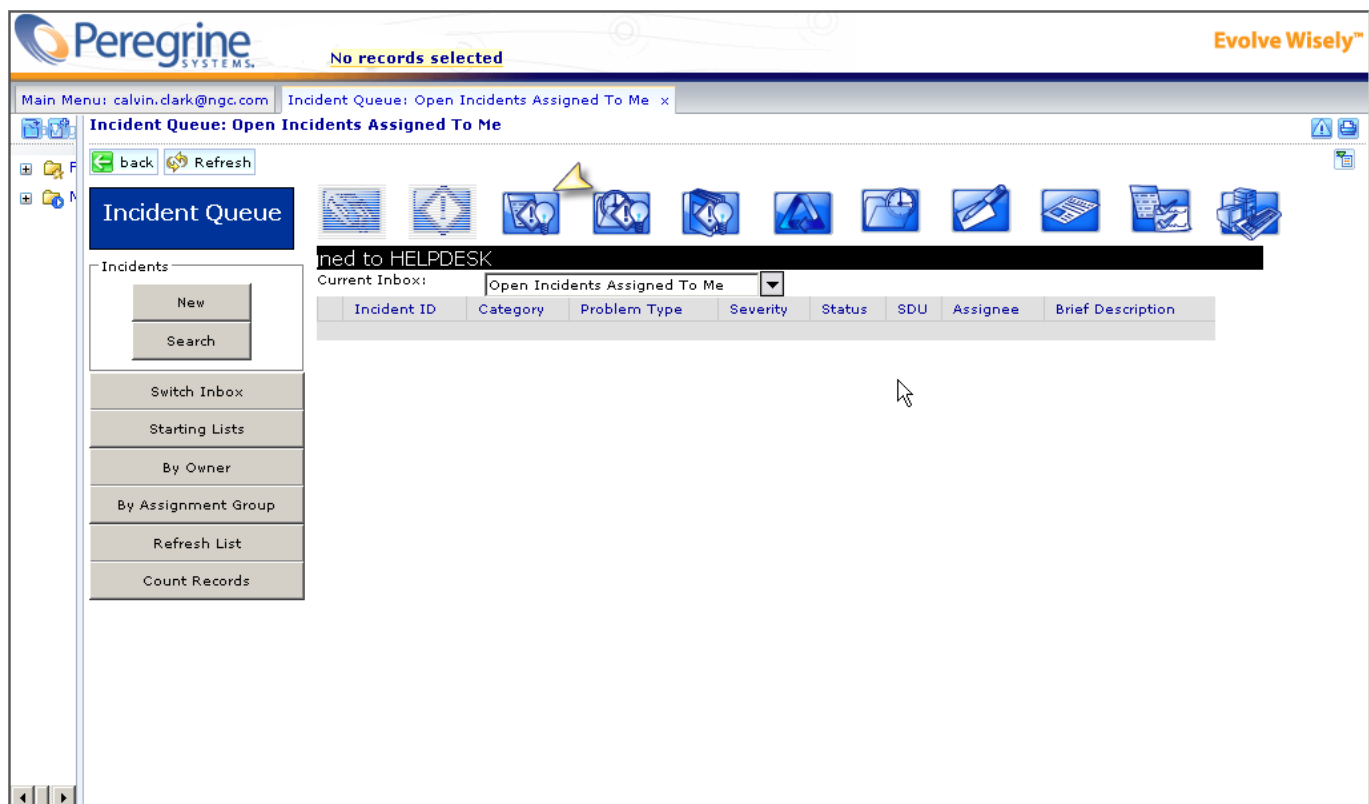
Investigation Classification Companies Activities Attachments SLA Related Records **Tasks** History Workflow

Task ID	Status	Assignee	Configuration Item
PM000027-001	Closed		ACME Phone 0004

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

## Lesson 8: Closing Problem

1. Click the Problem List icon below to locate the appropriate Problem Record, (see yellow arrow).



The screenshot shows the Peregrine Systems web interface. The top navigation bar includes the logo, a status message "No records selected", and the text "Evolve Wisely™". Below the navigation bar, there's a breadcrumb trail: "Main Menu: calvin.dark@ngc.com" and "Incident Queue: Open Incidents Assigned To Me". The main content area is titled "Incident Queue: Open Incidents Assigned To Me". On the left sidebar, under "Incidents", there are buttons for "New", "Search", "Switch Inbox", "Starting Lists", "By Owner", "By Assignment Group", "Refresh List", and "Count Records". The main area displays a table with the following columns: Incident ID, Category, Problem Type, Severity, Status, SDU, Assignee, and Brief Description. A yellow arrow points to the "Problem Type" column header. The table is currently empty, and the status bar at the bottom indicates "No records selected".

2. Select the Problem Record to close from the list displayed.

**Peregrine SYSTEMS** Evolve Wisely™

Main Menu: calvin.clark@ngc.com Problem Management Queue: All Problem Tickets x

**Problem Management Queue: All Problem Tickets**

back Refresh

**Problem Queue**


Problems: New Search

Switch Inbox Starting Lists Refresh List Count Records

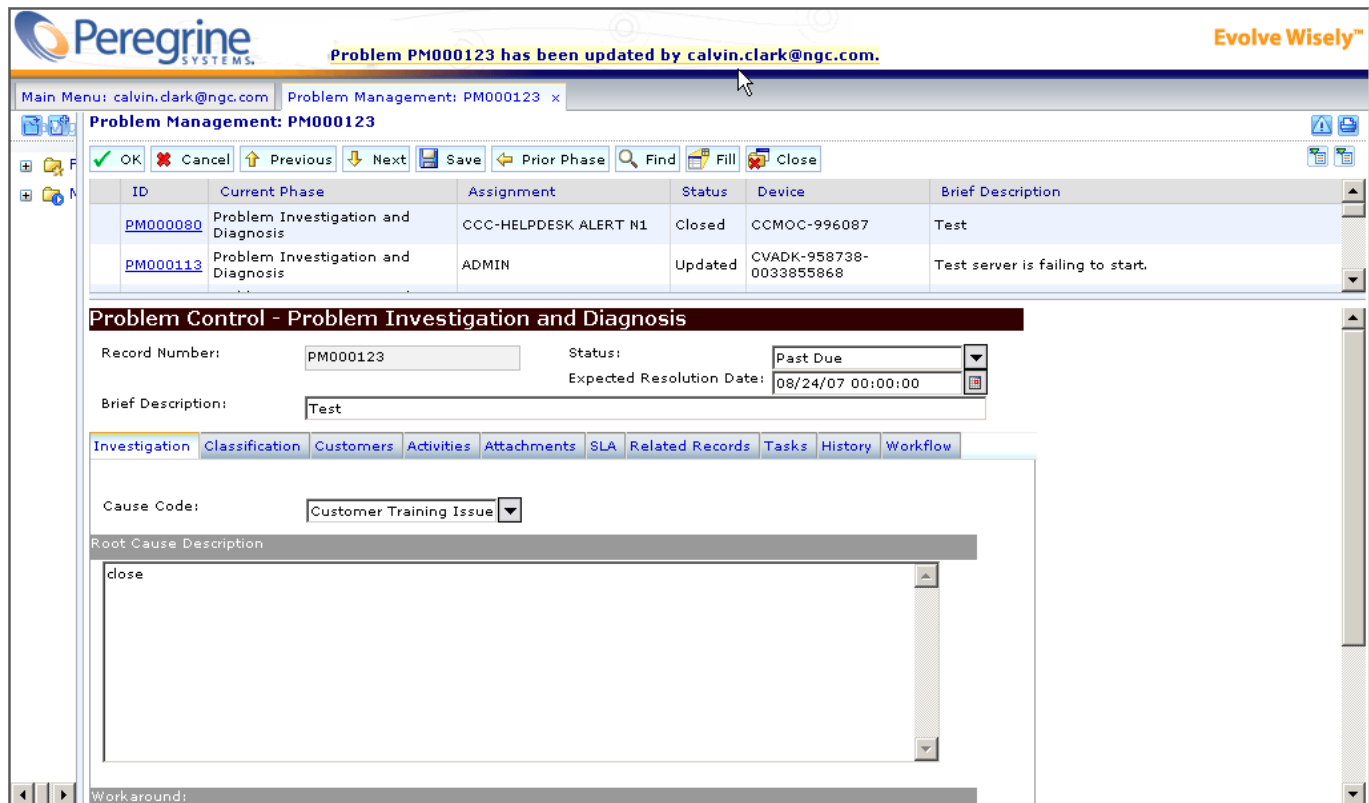
Current Inbox: All Problem Tickets

Problem ID	Category	Assignment	Status	Device	Brief Description
<a href="#">PM000080</a>	hardware	CCC-HELPDESK ALERT N1	Closed	CCMOC-996087	Test
<a href="#">PM000113</a>	hardware	ADMIN	Updated	CVADK-958738-0033855868	Test server is failing to start.
<a href="#">PM000121</a>	access	CCC-HELPDESK MANAGER	Past Due		Needs Peregrine password reset.
<a href="#">PM000122</a>	hardware	ACC-PAYROLL	Past Due	CVADK-999933-	ATM, FRAME-RELAY
<a href="#">PM000123</a>	access	ACC-GENERAL ACCOUNTING	Closed	CVADK-993458-TEST22	Test
<a href="#">PM000125</a>	hardware	ACC-MANAGER ALERT1	Past Due	CVADK-993466-TEST25	Test
<a href="#">PM000129</a>	inquiry	CCC-HELPDESK ALERT N1	Closed	CVADK-993458-TEST22	deborah hale
<a href="#">PM000131</a>	access	CPP-UNIX SECURITY	Past Due	CVADK-999562-	Agency/Agencies Affected: VDOT - St. Louis AHQ
<a href="#">PM000132</a>	access	ACC-GENERAL ACCOUNTING	Past Due	CVADK-993464-TEST17	test
<a href="#">PM000133</a>	hardware	ADMIN	Past Due		print server down
<a href="#">PM000134</a>	hardware	CCC-HELPDESK MANAGER	Past Due		Laptop
<a href="#">PM000135</a>	hardware	CCC-HELPDESK PROF	Past Due		Laptop



 Commercial, State and Local (CSL) group <b>PROCEDURE</b>	Document #:	<b>VITA-PDR-PM-XXXX</b>
AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

3. Click the **Close** button at the top of the screen



**Problem Management: PM000123**

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000080	Problem Investigation and Diagnosis	CCC-HELPDESK ALERT N1	Closed	CCMOC-996087	Test
PM000113	Problem Investigation and Diagnosis	ADMIN	Updated	CVADK-958738-0033855868	Test server is failing to start.

**Problem Control - Problem Investigation and Diagnosis**

Record Number: PM000123      Status: Past Due  
Expected Resolution Date: 08/24/07 00:00:00

Brief Description: Test

Investigation | Classification | Customers | Activities | Attachments | SLA | Related Records | Tasks | History | Workflow

Cause Code: Customer Training Issue

Root Cause Description: close


Workaround:

### Important Notes:

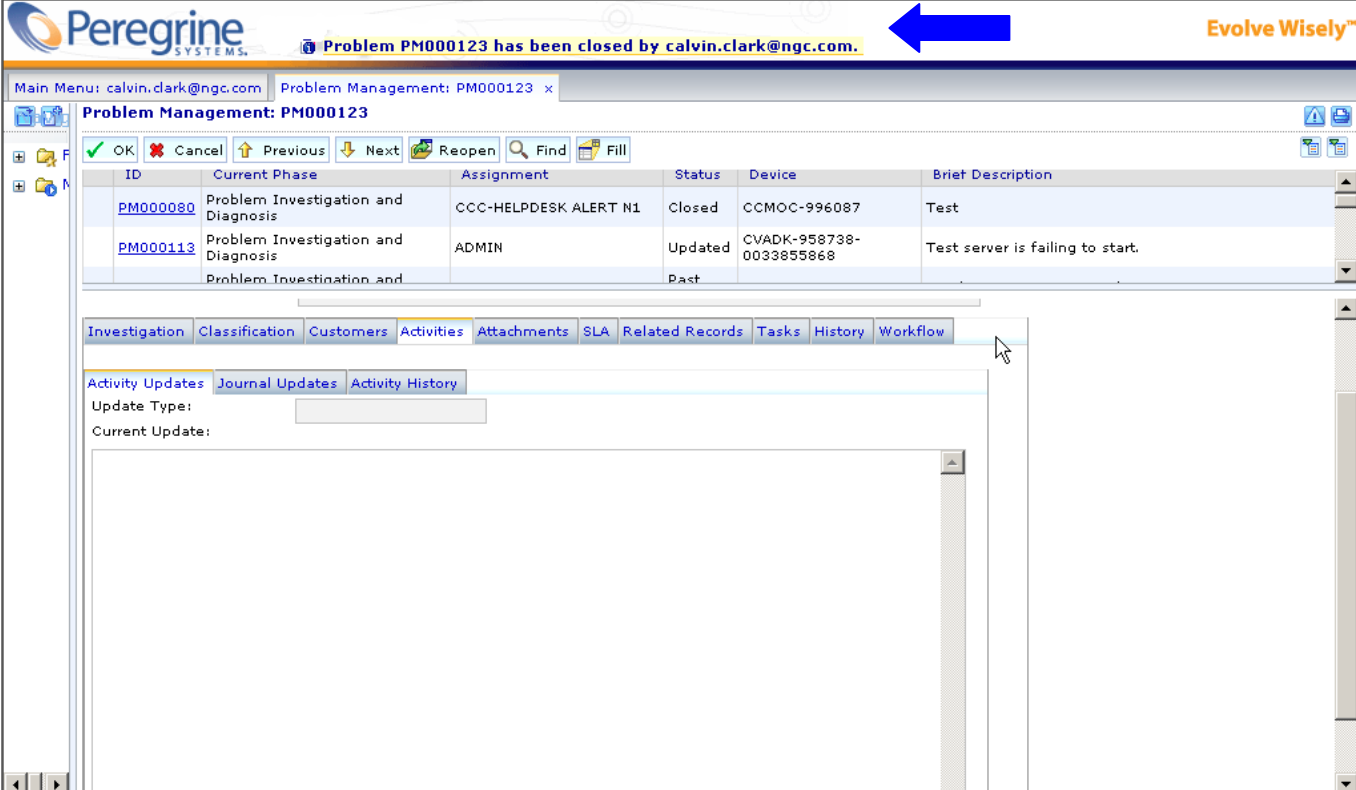
Only the Problem Manager and designated alternate may close a Problem Record. Problem Records without an actual resolution of the Problem may be closed if there has been a mutual decision to close the record and there has been acceptance of risks documented in the Known Error/Problem Records.

Before the record is closed, the Problem Manager will enter the reason for closure in the Activities Tab. All acceptance and agreements will be captured in detail in this note. The "status" will then be moved to "Closed"

This is not indicating that the Problem (issue) has been resolved or is closed. The Problem may still exist and any future events can be linked back to the original Problem Record and consolidated for trending and analysis purposes.

 <p>Commercial, State and Local (CSL) group PROCEDURE</p>	Document #:	<b>VITA-PDR-PM-XXXX</b>
<p>AUTHORIZED DOCUMENTS ARE PUBLISHED ONLINE ONLY. VERIFY ANY COPY AGAINST THE ONLINE SYSTEM BEFORE USE.</p>	Revision:	1.5
	Effective Date	04/01/2008
	# Pages	50

4. A system generated message at the top of the screen indicates, **Problem** has been closed.



**Peregrine SYSTEMS** Evolve Wisely™

Problem PM000123 has been closed by calvin.clark@ngc.com.

Main Menu: calvin.clark@ngc.com Problem Management: PM000123 x

**Problem Management: PM000123**

OK Cancel Previous Next Reopen Find Fill

ID	Current Phase	Assignment	Status	Device	Brief Description
PM000080	Problem Investigation and Diagnosis	CCC-HELPDESK ALERT N1	Closed	CCMOC-996087	Test
PM000113	Problem Investigation and Diagnosis	ADMIN	Updated	CVADK-958738-0033855868	Test server is failing to start.
	Problem Investigation and		Past		

Investigation Classification Customers **Activities** Attachments SLA Related Records Tasks History Workflow

Activity Updates Journal Updates Activity History

Update Type:

Current Update:

End of Lesson